Indiana Housing & Community Development Authority

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DV CLIENTTRACK USER MANUAL

2015

A guide to navigating ClientTrack, a web-based case management tool, from entering basic client information to managing case loads and reports.

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CLIENTTRACK USER MANUAL

Objectives

Thank you for using ClientTrack for your case management needs. ClientTrack is an electronic data collection system for persons who access a variety of services for homeless prevention and/or rapid re-housing services. Aggregate data can be used to understand the size, characteristics and needs of the population at the local, state and national levels. ClientTrack enables you to track information about client needs, goals and service outcomes.

The content in this user manual will provide information on all of the basic features of ClientTrack and detailed guidance on your day to day data entry, as well as helpful case management tools to optimize your services and time. We believe you will find this web-based case management system easy to use and essential in sharing your impact.

In this manual you will find the following information:

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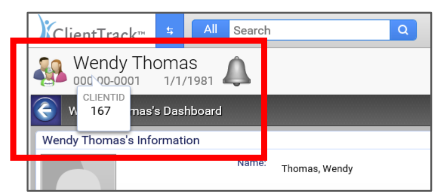
DV CLIENTTRACK HELP DESK

If you encounter any issues with ClientTrack at any time, please contact the help desk with the email address below. **Please do not send any identifying information for clients when emailing the help desk.** There is a unique client ID number assigned to each client record in the system and you can find this number by hovering over the client name at the top of the client record. **Please use the client ID number when emailing the help desk if applicable.**



DV Help Desk: DVHelpDesk@ihcdaonline.com

CLIENTTRACK ACCESS

CLIENTTRACK FOR DOMESTIC VIOLENCE PROVIDERS

HTTPS://IHCDAONLINE.COM/IDV/

Security Policies & Procedures

Personal protected information (PPI) is considered any information that could lead to individual identification. Agencies participating in ClientTrack should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from ClientTrack or created for entry into ClientTrack. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI including data contained on disks, CD's, jump drives, computer hard drives and/or other media should be reformatted before disposal.

PRIVACY AND CLIENT INFORMATION RESTRICTIONS

The Domestic Violence ClientTrack environment is a closed system. Client level data is only seen by your organization and the support team.

A client can refuse data collection or data entry into DV ClientTrack, but the client should be asked. The agency cannot determine participation on behalf of the client. ***No person is to be refused services regardless of their participation in ClientTrack.***

You can find Indiana's Balance of State (BOS) security plan on the partner website, as well as other helpful forms and resources: http://www.in.gov/myihcda/hmis.htm.

CLIENTTRACK COMPUTERS

All computers used to access ClientTrack should be situated in secure locations. ClientTrack computers in publicly accessible areas should be staffed at all times and not viewable by other individuals. All computers should be password protected and the password you use to log onto your computer should NOT be the same password as your ClientTrack password, but rather a password to prevent access to the computer itself.

ClientTrack usernames and passwords should NOT be shared with other users. Users should not keep username/password information in a public location (i.e., sticky notes on monitors or filed under ClientTrack or Password in a Rolodex). ClientTrack security policies require the use of strict passwords. Passwords must have:

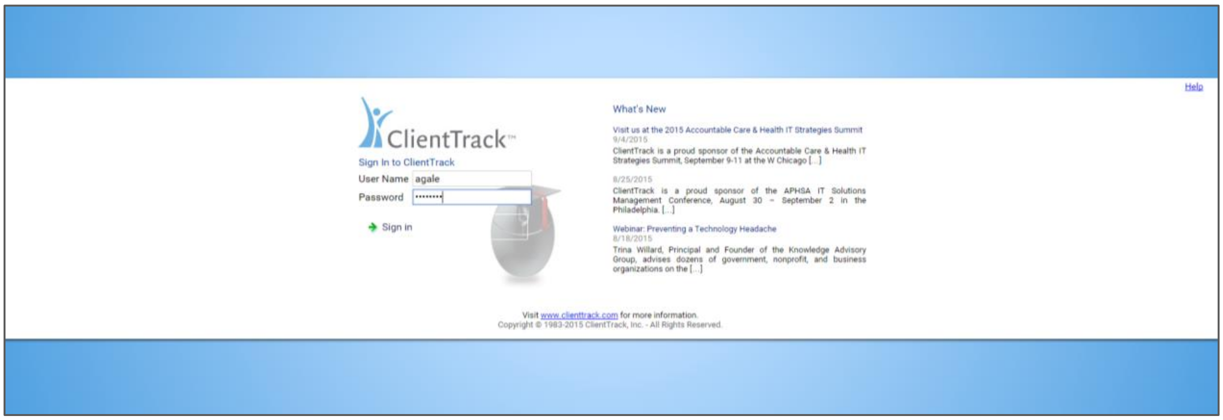
- At least one number
- Between 8 and 12 characters
- At least one non-letter, non-numeric character
- At least one capital letter

New passwords will be required when you first login. **Accounts are automatically deactivated after 30 days of inactivity for security purposes.** You will be required to change your password every 90 days for security purposes. If you need assistance with your username and password contact the Help Desk by emailing DVHelpDesk@ihcdaonline.com and someone will assist you.

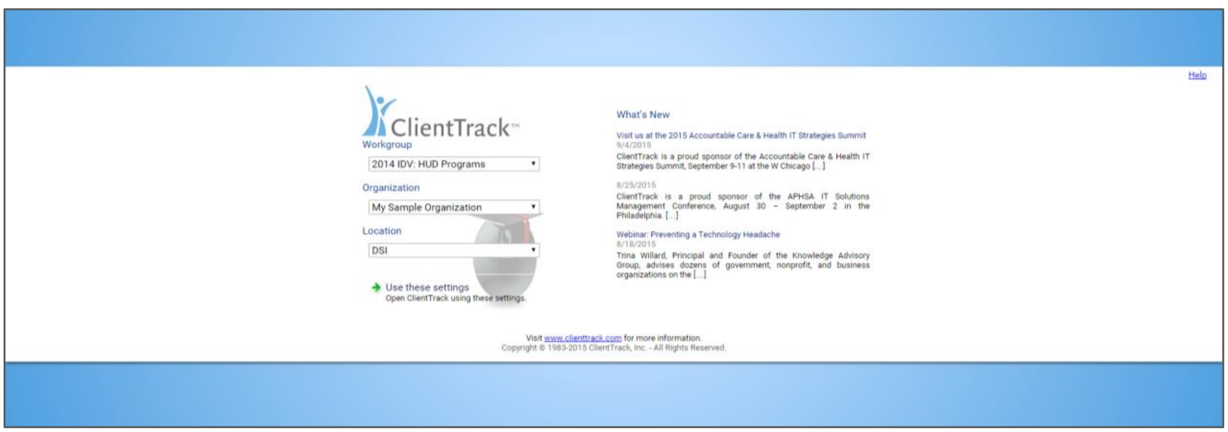
LOGGING INTO THE SYSTEM

ClientTrack is a web-based application and you will need to use an internet browser to access it. ClientTrack works with Microsoft Internet Explorer, Google Chrome, Mobile Safari and Mozilla's Firefox.

Open your web browser and go to https://ihcdaonline.com/IDV/. Enter your assigned User Name and Password and click "**Sign In.**" **Remember, sharing your user name and password is NOT permitted. Passwords are case sensitive and pop-up blockers must be turned off to access the application. You may need to change your settings to allow for pop-ups from this site.**



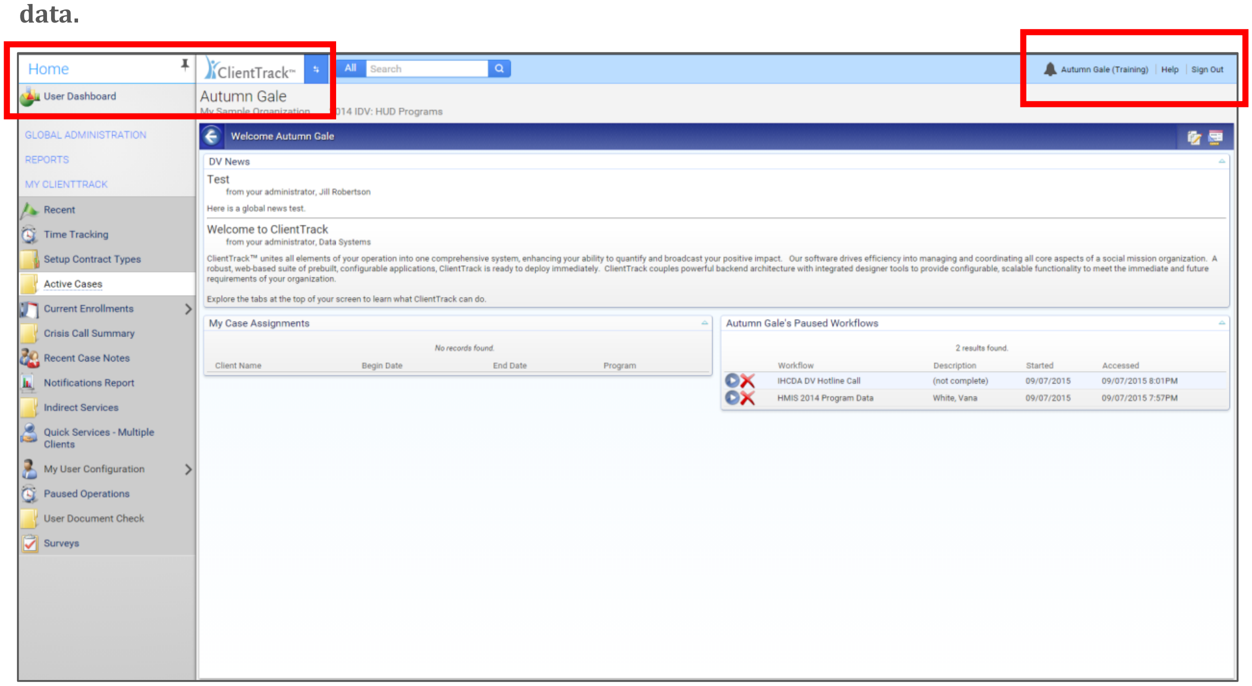
Select the workgroup called **"2014 IDV: HUD Programs."** Also make sure your organization and location is selected appropriately. Click on "**Use These Settings**" to continue. You will be required to "**Accept**" the Terms of Agreement when you log into the system for the first time.



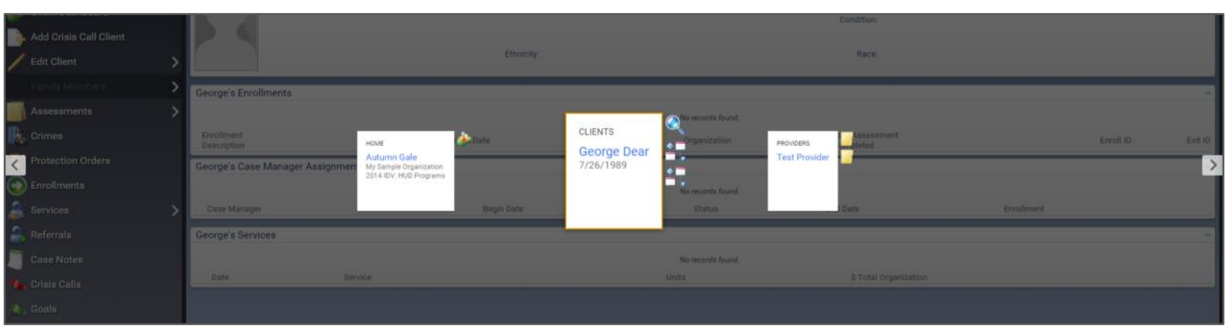
Overview of ClientTrack Features

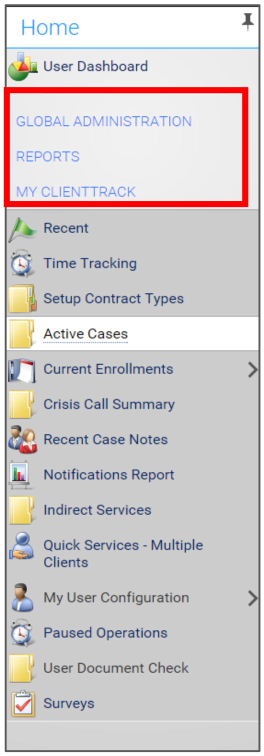
USER DASHBOARD

You will be directed to your **User Dashboard** on the **"Home"** screen and notified of any important **"ClientTrack News"** items IHCDA wants to communicate (i.e. upcoming trainings, changes etc.) – this is the first screen you come to after logging in. The **"Sign Out"** link is in the upper right-hand corner of the screen. **Please be sure to "Sign Out" any time you need to leave the database to ensure security of client data.**



You can access all three screens, **"Home," "Clients"** and **"Providers,"** which provide you different features for managing your cases by clicking on the link with white arrows to the immediate right of the ClientTrack logo outlined with the red box above. After clicking on the icon, you will see the three boxes appear labeled, **"Home," "Clients"** and **"Providers"** and you can toggle between them by clicking on the appropriate box to take you to that section of ClientTrack as seen below.

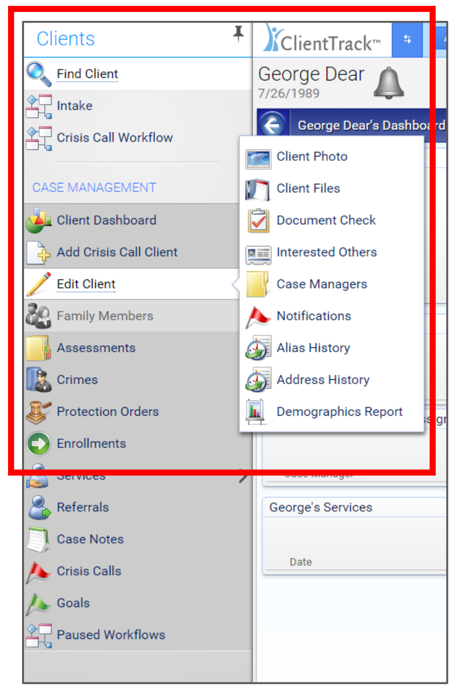




On the **"Home"** screen there is also a list of **Menu Items** that give you easy access to your current case assignments, case notes and more under **"My ClientTrack."** You can also change your password with the **"Change My Password"** link by clicking on **"My User Configuration"** in the list of Menu Items. All of these tools are designed to maximize your time and grant you easy access to your client records.

You will also find the **"Reports"** section on the **"Home"** screen. To run a variety of reports, which will be detailed later in this manual, click on **"Reports"** found above **"My ClientTrack"** in the upper left-hand corner of the screen to access reports.

CASE MANAGEMENT TOOLS



On the **"Clients"** screen you will find the most recent client record you were on as well as a list of **Case Management Tools** on the left-hand side of the client record. The following information outlines features and tools found on the client record. To access some of these features you must hover on the link in the case management section and a list of tools will appear as seen in the red box:

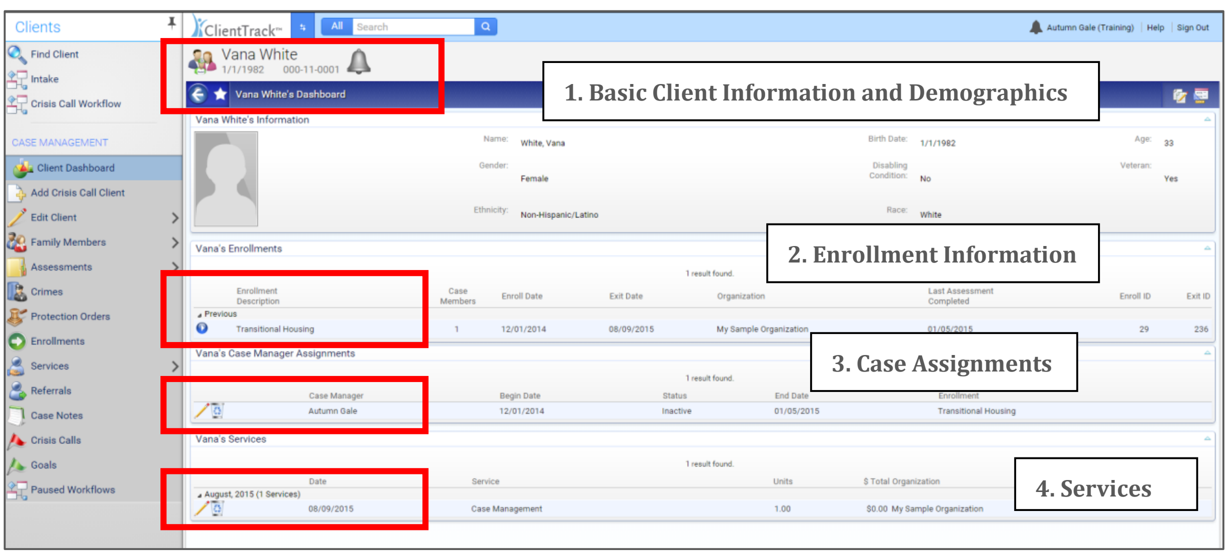
- **Find Client** – To search for a client in the system by first and last name, date of birth, social security number, client ID number, etc.
- **Intake** – To enroll a client in your project.
- **Crisis Call Workflow** – To document a client's hotline call to your agency.
- **Case Management Tools:** *(Frequently Used)*
  - **Client Dashboard** – Click on this link to be taken back to the client's record overview. The overview of the client record is outlined on the next page.
  - **Edit Client** – To edit basic client information like address, date of birth, social security number, disabling condition, veteran status, etc. There are more helpful tools under "Edit Client" that are available for you to use depending on your agency's needs and requirements.
  - **Family Members** – To review a history of households and household members.
  - **Assessments** – To review assessments - and please note that all required assessments for your project are captured in the Intake Workflow. This is where you can access the **Crimes** and **Protection Orders** assessments to document important information regarding your client's legal processes or the **Family Development Matrix.** It is necessary to document

crimes in order to document for the VOCA Report. You can also add judges and prosecutors to your documentation in connection with protective orders.
  - **Enrollments** – To view the list of current and past enrollments in which the client has participated.
  - **Services** – To add, edit and view the list of services the client has accessed.
  - **Referrals** – To create and manage referrals.
  - **Case Notes** – To create and review case notes.
  - **Crisis Calls** – To review and edit crisis calls for a client.
  - **Paused Workflows** – To resume a workflow you previously paused.
- **Basic Client Information and Client ID Number -** Located at the top of the client record and includes the client's name, gender, date of birth, etc. The client ID number is located beside the client name at the very top of the client record *(Client ID Number is required when communicating electronically about a client record, i.e., requesting assistance from the help desk).*

CLIENT RECORD

The client record is broken up into sections with case management tools to help you easily find client information and manage program enrollments, services, case notes, and more.

1. At the very top of the client record, you will see the **client's basic information** and demographics as shown below. You can find the client ID number, which is automatically assigned to the record when created, beside the client's name at the top of the record.



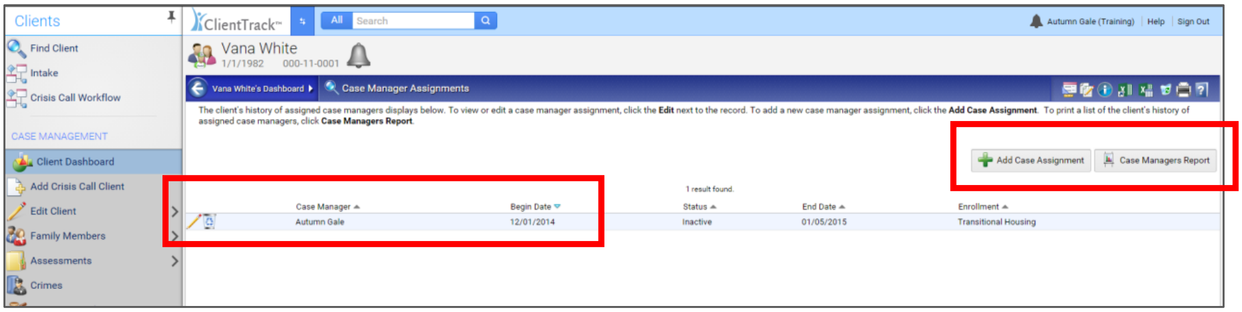
2. In the center of the client record, you will see all of the client's past and present **program enrollments** as seen above.

There is a blue play button or action wheel you can click on to easily manage your program enrollment. When you click on the blue play button, a drop down list will appear where you can:

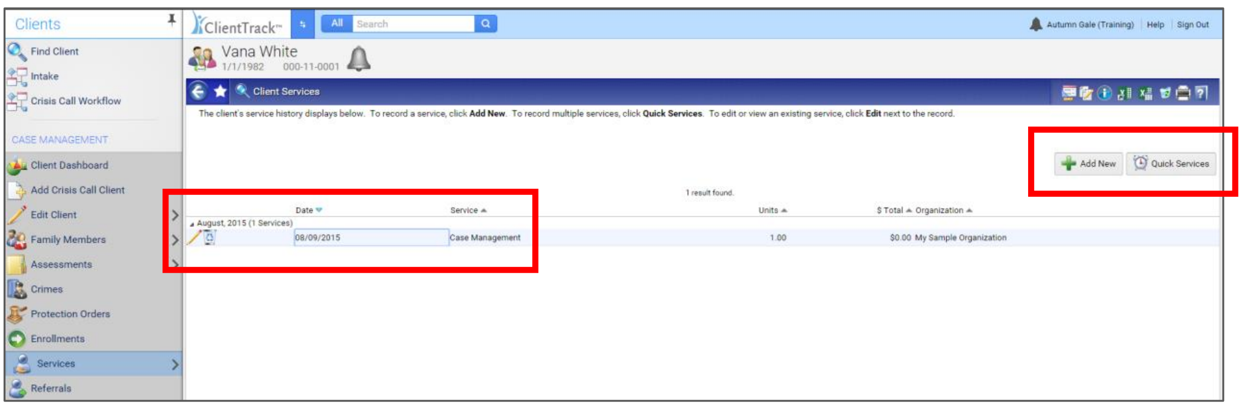
- **Edit Enrollment** – Edit the enrollment date with this feature.
- **Re-enter the Enrollment** – Use this feature to re-enroll a client who was prematurely discharged or his/her enrollment status changed to continue services.
- **Add Family Member** – Use this feature if a new household member needs to be enrolled after an enrollment has already been established, i.e., a new baby is born and needs to be enrolled with Mom. Make sure you're on the head of household's client record when adding a family member to the enrollment. This workflow will step you through adding the household member and enrolling him/her at the same time.
- **View Case Members –** View all case members associated with the specific project enrollment.
- **Review Entry/Exit Assessments** – You can review the assessments completed at entry and exit with this feature. This is helpful in completing missing data that was not captured at those points in time.

- **Update/Annual Assessment** – Use the Update/Annual Assessment to conduct annual assessments or capture changes to a client's status since enrollment.
- **Exit the Enrollment –** To exit a client, select "Exit the Enrollment" and you will be prompted through the exit workflow for the client and all household members if applicable. If you need to only exit one household member, go to the specific household member's client record and conduct the exit workflow and be sure to not select "Exit All Case Members."

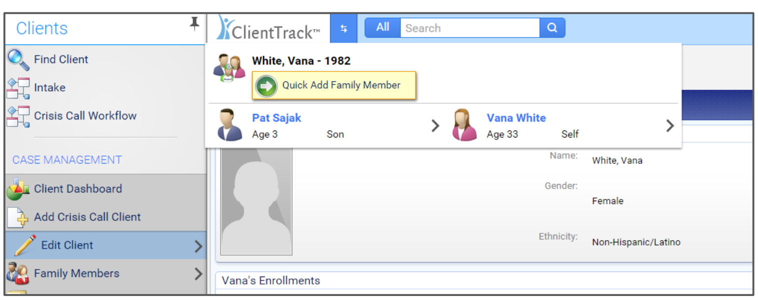
3. Case Manager Assignments are located below the enrollments section of the client record. You can manage case manager assignments here by clicking on the **"Vana's Case Manager Assignments"** link or clicking on the little notepad beside the case manager's name listed. By clicking on the case manager assignments link, you will be taken to a screen where you can edit the status of a case manager for a specific program enrollment or add new case managers to the client record (outlined on the next page). Clicking on the **recycle bin** beside a case manager's name will delete the case manager from the client record.



4. Services associated with a specific program enrollment will be listed at the bottom of the client record. You can manage your client services by clicking on **"Services"** in the list of case management tools on the left-hand side of the client record or by clicking **"Vana's Services"** above the list of services on the client record. Documenting services is discussed in detail on pages 32 and 33 of this manual.



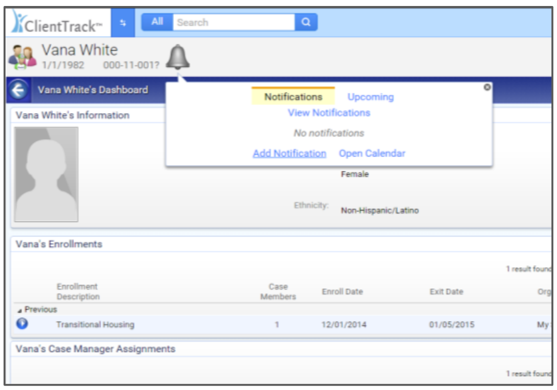
HOUSEHOLD MEMBERS

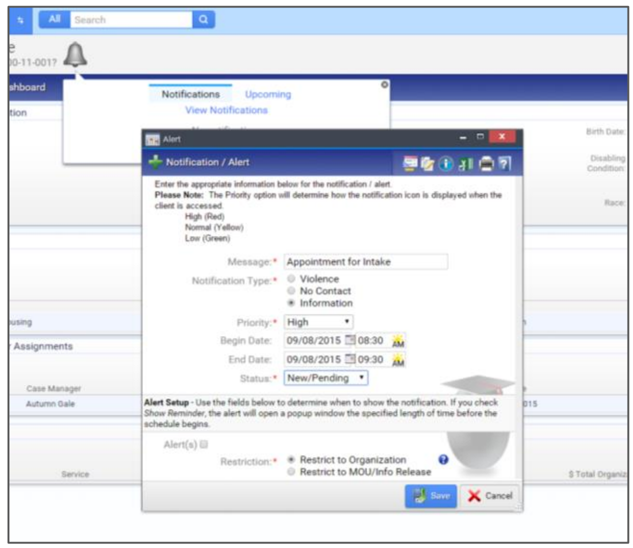


You can view household members and their client records by clicking on the **multi-colored family icon** at the top of the client record beside the client name. A window will appear with all of the current household members. You can click on the names of the household members in the window to go directly to his/her client record. You can also use the **"Quick Add Family Member"** link in this drop down to add new household members. **Please note that you will be able to add household members during an Intake workflow as well.** You may also add a family member to an existing enrollment with the **"Add Family Member"** feature (described on page 8) listed when you click on the blue play button beside your program enrollment. This will prompt you through the new household member's information as well as the intake workflow to include the new household member in the enrollment. Be sure to change the date to reflect the actual date of enrollment.

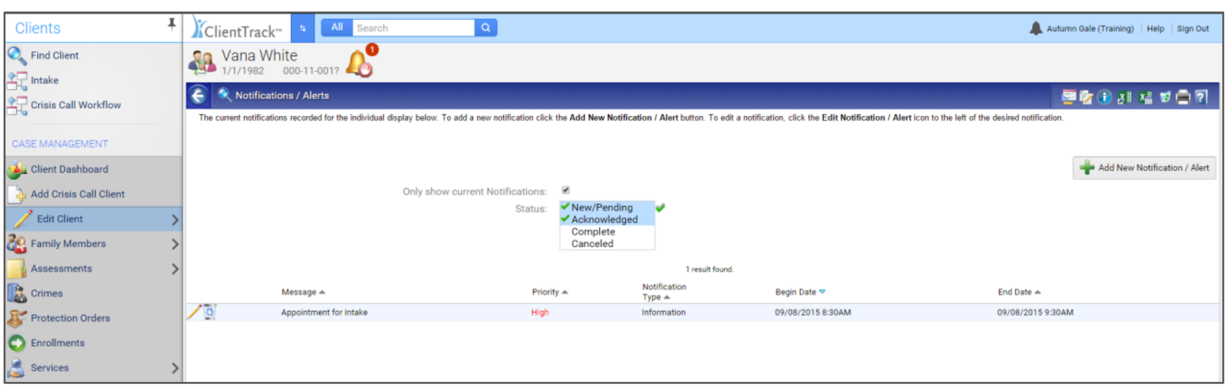
NOTIFICATIONS

ClientTrack features a **"Notifications"** tool on the client record that allows you to set up notifications specific to the client, like reoccurring appointments, required documentation, client deadlines, etc. The Notifications tool looks like a bell and is located beside the multi-colored family icon at the top of the client record. To add a new notification, click on the bell and a new window will appear below it. Select **"Add New"** to add a new notification. A new window will open where you can set up the new notification as seen below.





After setting up the notification with your specifications, you can review your notifications and calendar by clicking on the bell and selecting **"View Notifications"** as seen below. You can also see that the bell changed in color to show that a notification has been set up for this client record.



Entering Client Information and Managing Program Enrollments

FINDING A CLIENT IN THE SYSTEM

Before entering a client into the system as a new client, you should always conduct a search for the client to see if there is an existing client record in the system. To search for a client, click on **"Find Client"** in the upper left-hand corner of the screen as outlined in red below.

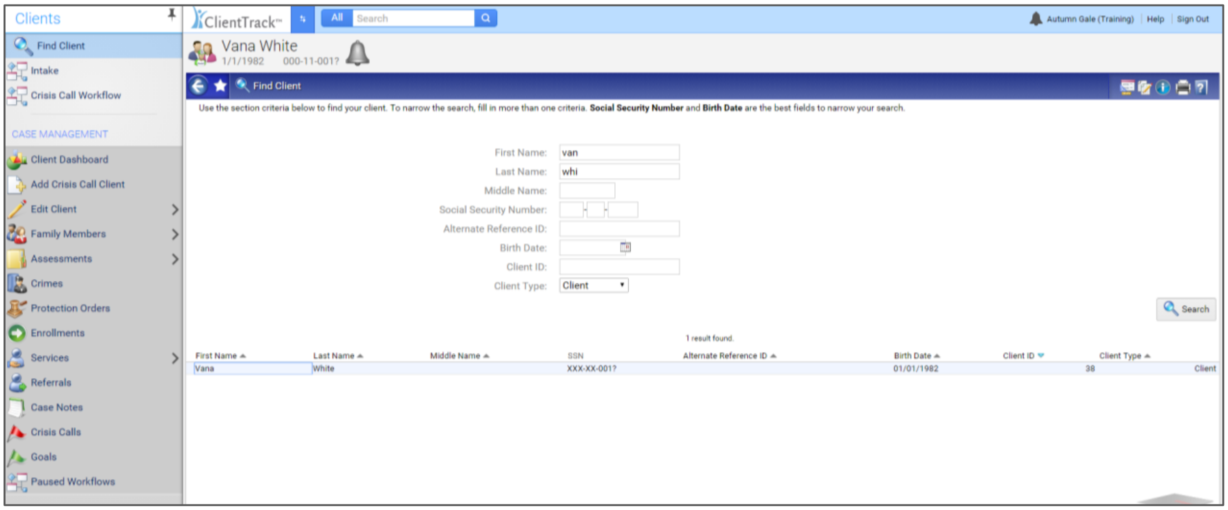
It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the data. To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields. You may search for a client by entering any of the following:

- Letters of the client first/last name (try only entering the first few letters of the name to conduct a thorough search)
- Social Security Number
- Birth Date
- Client ID Number

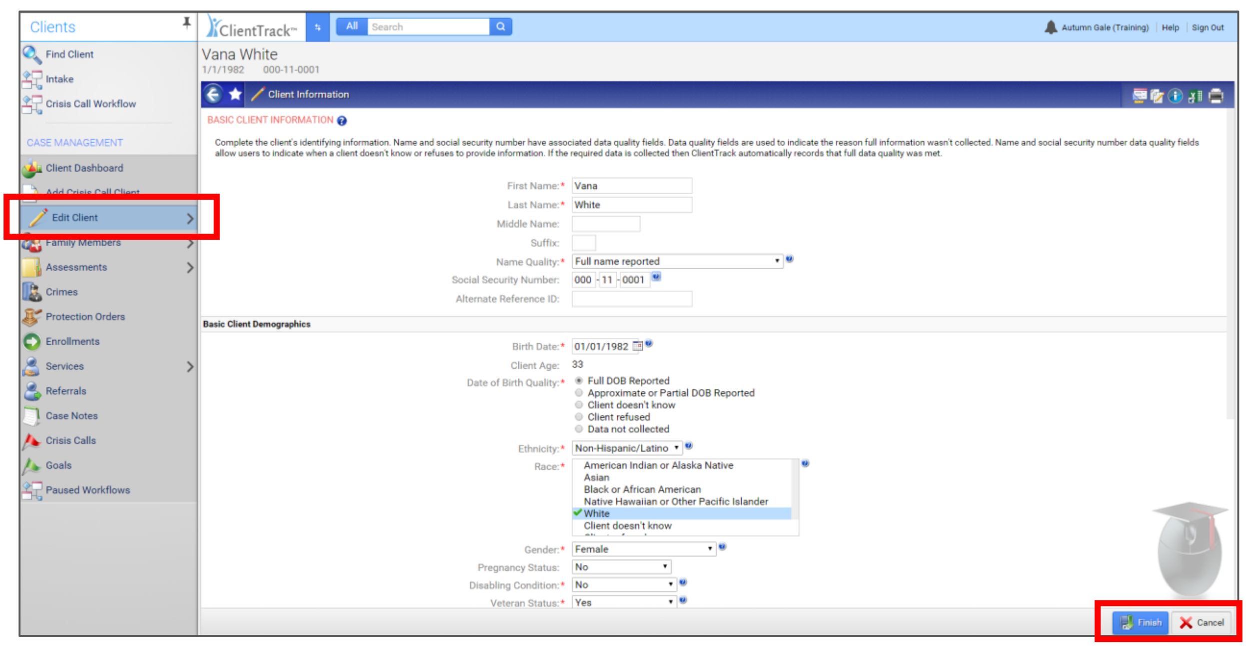
It is important to try different options for your search. **Again, it is best to ONLY enter the first few letters of the first and last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data.** Another option for searching is to search different spellings of the client's name and remember to search for nicknames such as "Joe" in addition to "Joseph" or "Jen" in addition to "Jennifer."

IHCDA works to eliminate duplicate clients in ClientTrack. Please contact the DV Help Desk at DVHelpdesk@ihcdaonline.com with clients who have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the Help Desk, please ONLY send Client ID numbers. Client ID numbers are found by hovering over the client name at the top of the client dashboard.

If the client is already in the system, highlight the client name in the search results and click on the **Client Name** to select that record. The selected client's information will be displayed at the top of the screen and all information entered from this point forward while on the **Clients screen** will be associated with the currently selected client.



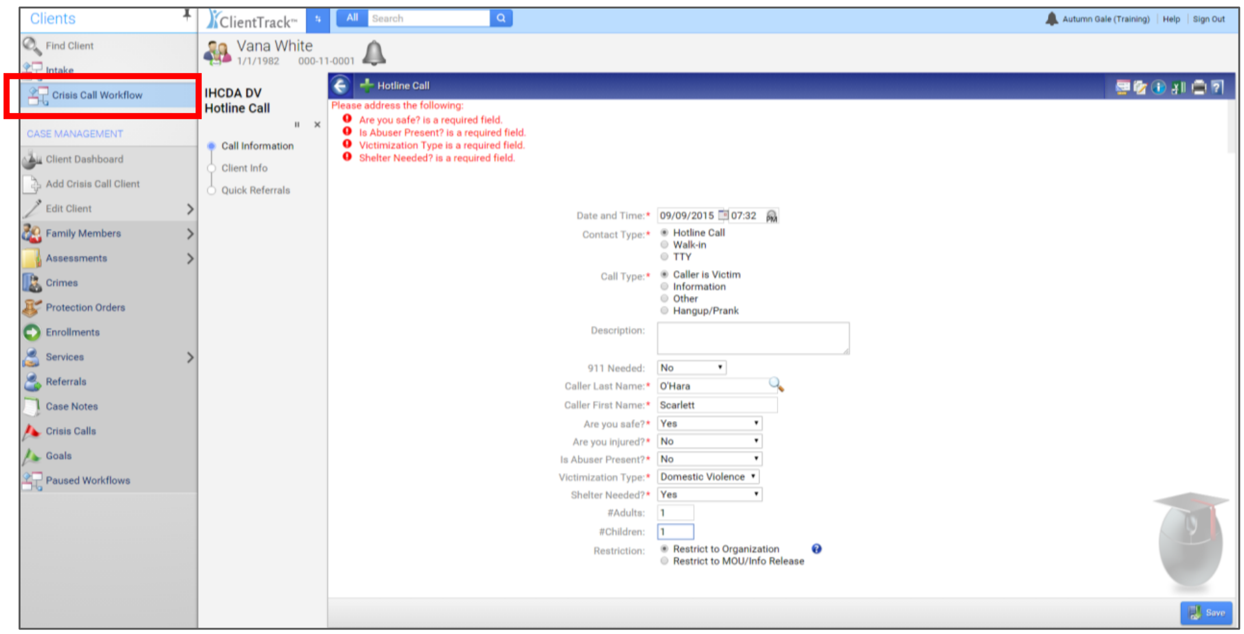
If the client's basic information has changed, you should click on the "**Edit Client**" case management tool found on the left-hand side of the client record outlined in red below to make any necessary changes to the client demographic information (i.e., birth date, ethnicity, name change, etc). *****Please note that the "Save" button will save the changes you made to the screen and take you to the Client Dashboard.***



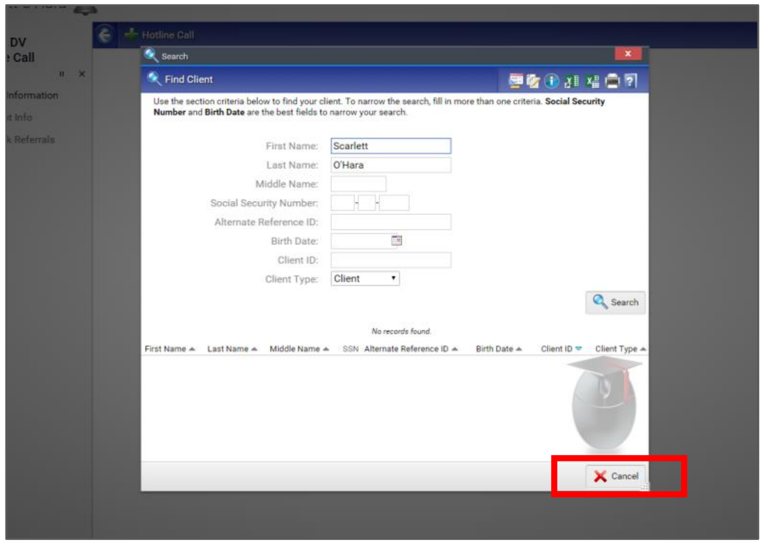
ADDING A NEW CLIENT WITH CRISIS CALL WORKFLOW

ClientTrack utilizes a specific workflow to step you through the process of completing all required data elements. Be sure to first conduct a search for your client with the **"Find Client"** tool and if your client cannot be found in the system, click on **"Crisis Call Workflow"** on the **"Clients"** screen to document a crisis call and add a new client. ***Please note that crisis calls can also be documented as a service in the service section of ClientTrack.***

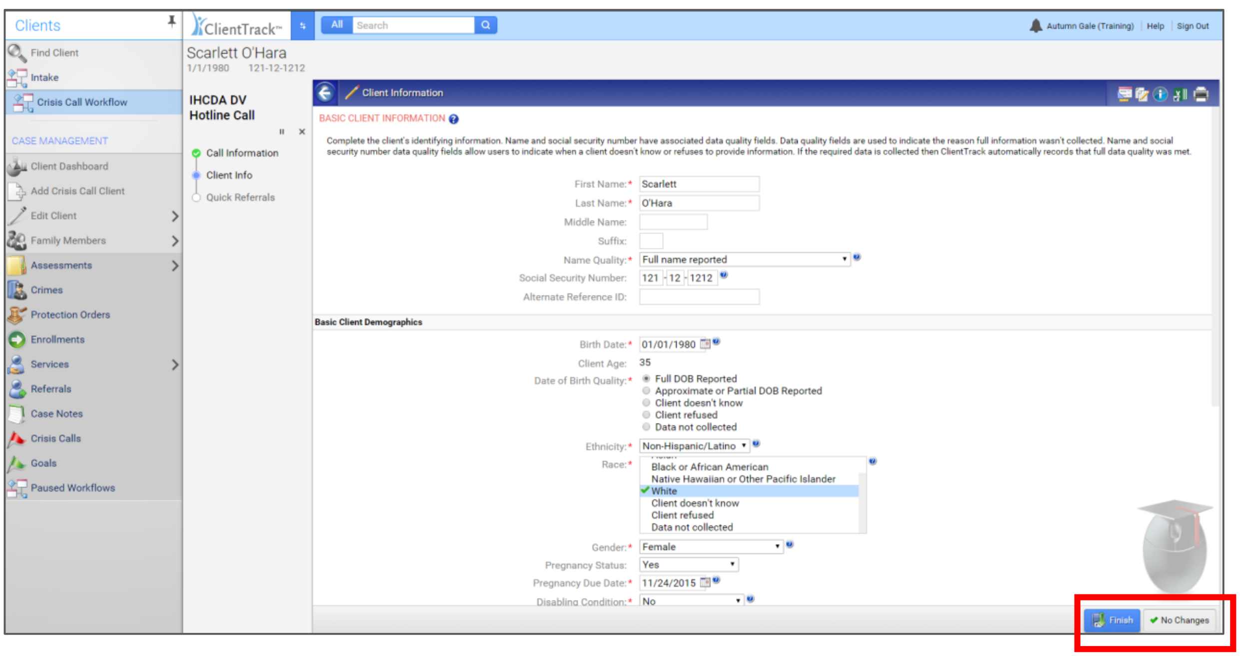
The Crisis Call Workflow will be prompted and you will be taken to the first screen where you document the time of the call, the caller and all other important information. Some fields may require additional information and those fields will populate if required. Please note that all fields with an asterisk * are required data elements and must be completed before moving to the next section of the workflow process. Click **"Save"** when finished.



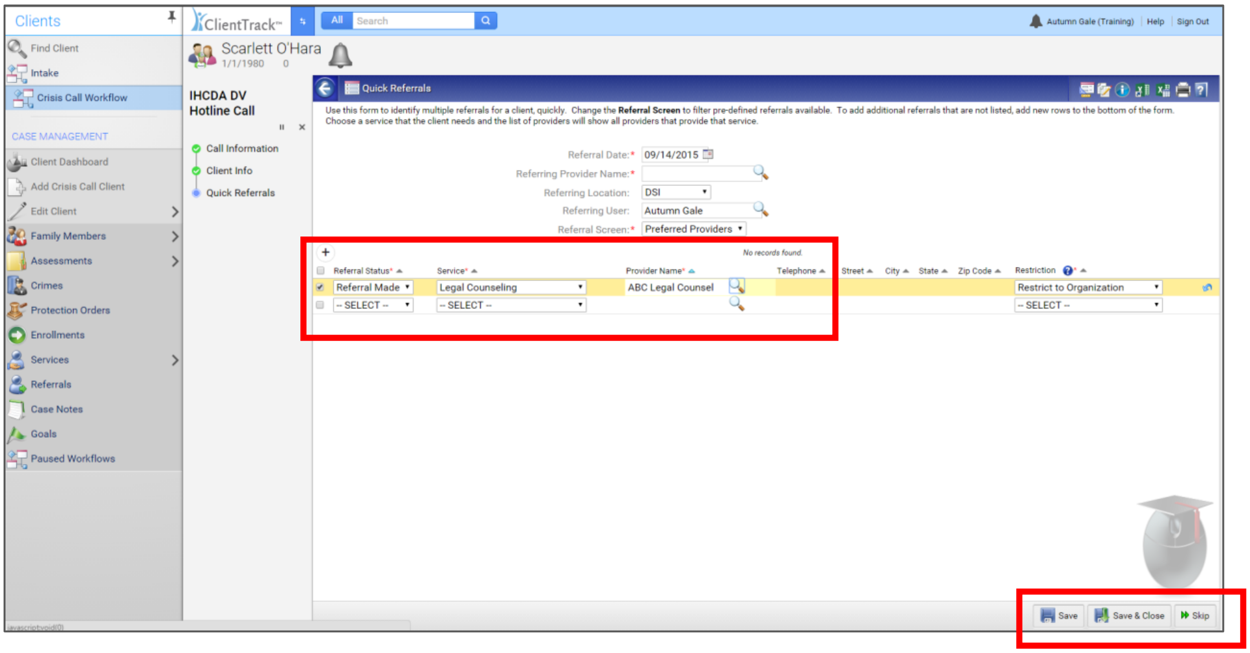
When entering the caller's name, the system will conduct a search in the database to double-check whether a client record already exists for the caller. If the client appears in the search list, please click on the client's name to select that client record. If the client does not appear in the search list, click **"Cancel"** and continue entering the caller's information.



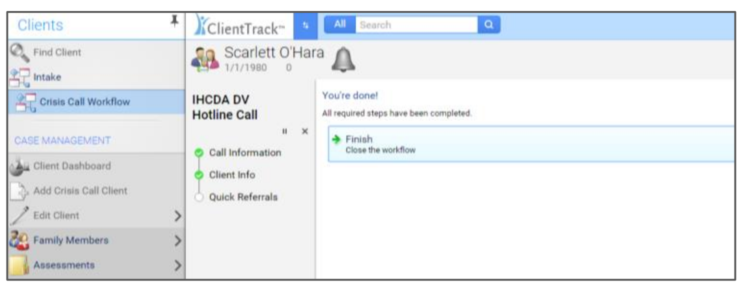
Review or enter the caller's basic client information and complete all fields with an asterisk *. Click **"Finish"** when completed.



The next section of the Crisis Call Workflow allows you to document any referrals made. Complete the information and you can add as many referrals as necessary by clicking on the plus sign (+) button above the **"Referral Status."** You can set up a database of providers to attach to referrals, crimes, protection orders under the **"Providers"** screen. Providers are covered in more detail on page 52. Click **"Save & Close"** when finished or **"Skip"** if no referrals are made at that time.



This completes the Crisis Call Workflow and you will be prompted to **"Finish"** the workflow to close it and document the call under **"Crisis Calls"** in the list of case management tools on the client's record.

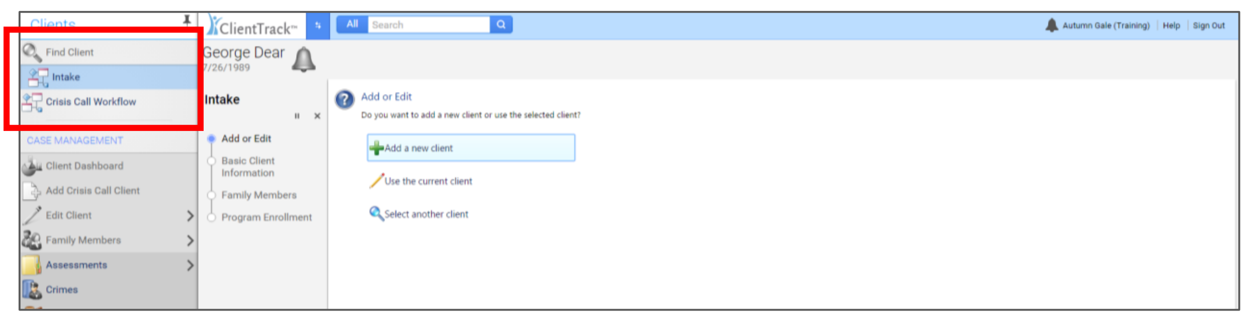


You can manage and review a client's crisis calls by clicking on **"Crisis Calls"** in the list of case management tools to the left of the client record. To review or edit a call, click on the little notepad beside the specific call. You can remove crisis calls by clicking on the recycle bin beside the call. Please note this will delete the call from the client's record.

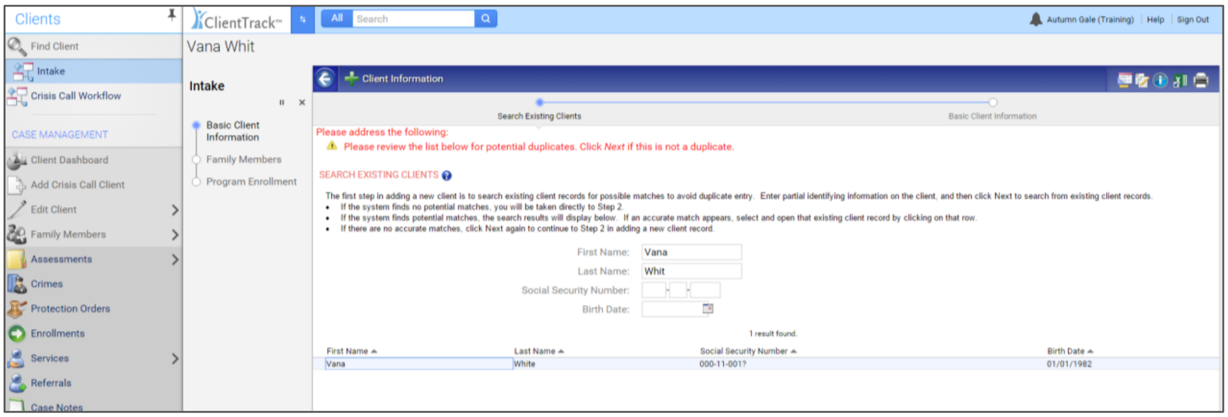
ADDING A NEW CLIENT WITH PROGRAM ENROLLMENT

ClientTrack utilizes a specific workflow to step you through the process of completing all required assessments at entry and discharge. The workflow is easy to use and it automatically prompts you for the necessary information.

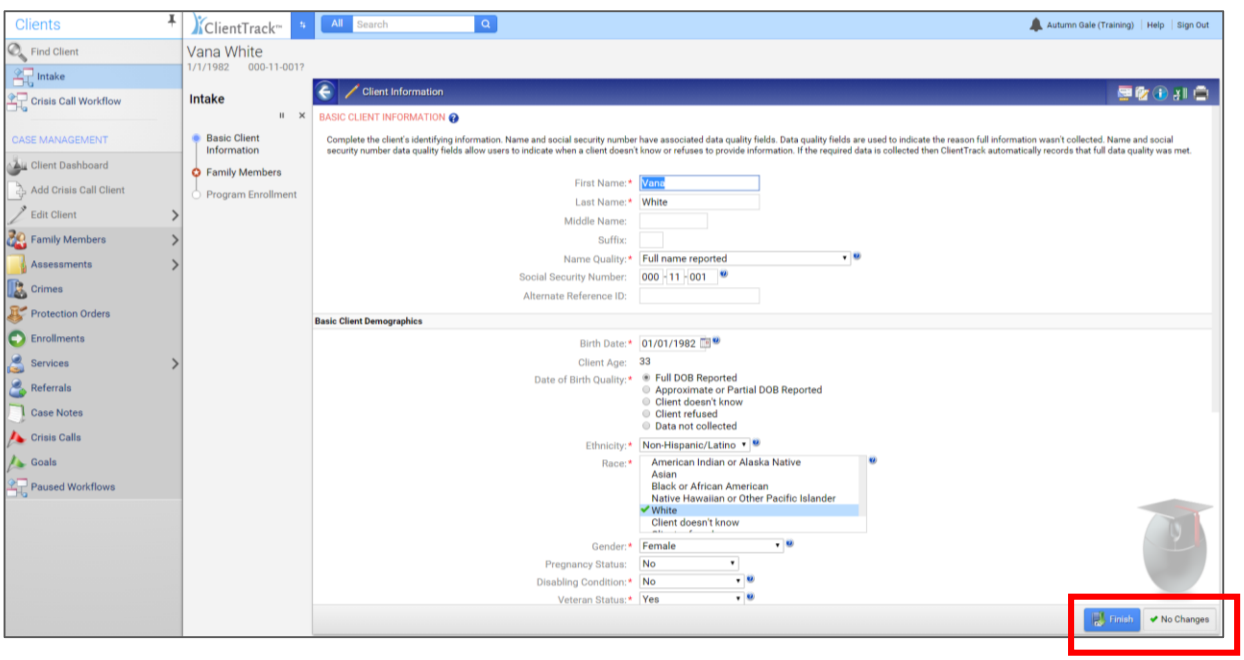
After conducting a search for the client in the system to ensure an existing client record does not already exist, you can add a new client record by selecting **"Intake"** in the upper left-hand corner of the screen found under **"Find Client"** (outlined in red below). Then choose **"Add New Client"** when prompted as seen below.



Enter your client's first and last name and click **"Next."** If a duplicate client already exists and was not identified during the client lookup, a warning in red letters will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select the existing client record. If the client you are entering is a new client, do not select a client in the displayed list, click "**Next**" to proceed with the intake process.



Add the client's basic information including date of birth, social security number, demographics, disabling condition, Veteran status and address. Click **"Finish"** when the client's basic information is complete. **Please note that all of the data elements are self-declared by the client and not attributed by the case manager or data entry personnel. The option "Data Not Collected" indicates that the question was not asked of the client and will report as missing on reports. Please do not make up information or answer for the client.**

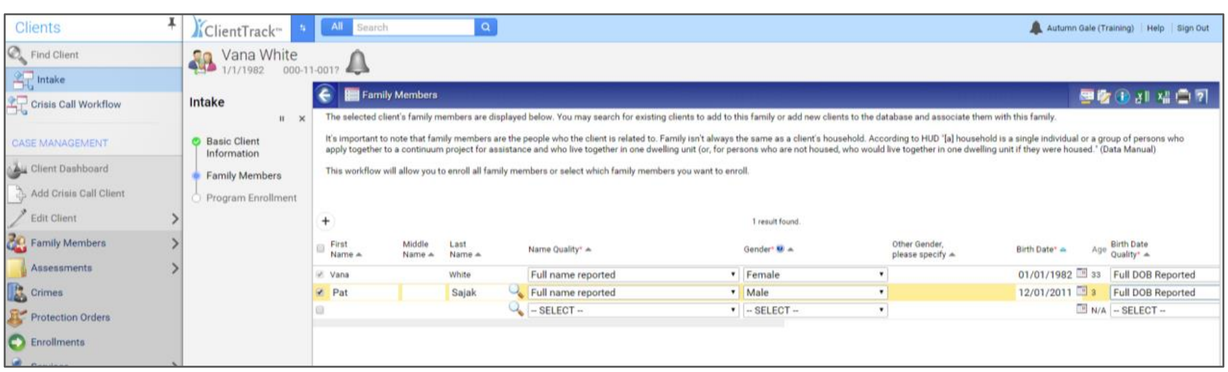


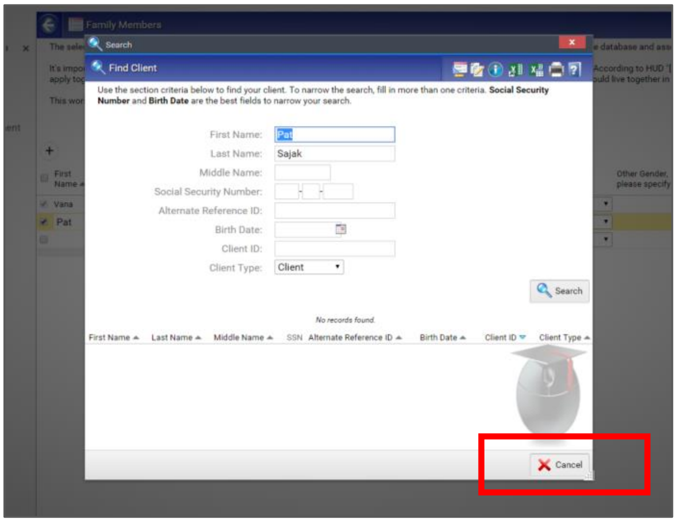
Definitions of Basic Client Information Requirements

- **First Name -** Legal first name (do not add nicknames in "quotes" because those are not searchable elements. Add this information to the alias field.)
- **Last Name** – Legal last name
- **Social Security Number (SSN)** – If the client doesn't know or refuses to provide their SSN, DO NOT under any circumstance, enter a fake social security number such as 123-45-6789 or 999-99-9999. Select the data quality option that best reflects the client's response.
- **Birth Date** – Month, day and year the client was born. Again, do not make up a birth date. Choose the appropriate data quality option that best reflects the client's response.
- **Ethnicity** – Hispanic/Latino origin includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin.
- **Race** – A person can identify with multiple races and this is a multi-select box that allows for multiple races to be checked at once.
- **Gender** – Select gender with which the client identifies.
- **Disabling Condition** – Select the appropriate response as reported by the client.
- **Veteran Status** – Select the appropriate response as reported by the client. If you select "Yes" for Veteran Status here, you will be prompted in the workflow to complete the Veterans Assessment.
- **Family** – Do NOT enter anything in the "Family" field. ClientTrack will create a household/family account.
- **Relationship to Head of Household** – When entering the first client in the household, the system will default to "Self." It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up.
- **Address** – Add the address where the client currently resides (emergency shelter, etc.). If the client enters emergency shelter, you should use their previous address.

Adding Household Members

Next you will add any additional household members to include for the program enrollment or services. To add household members, click on the empty box and complete the row of information (name, birth date, etc.) for the new household member. You can tab through the fields to complete the required information, and you can add any number of household members at this time by repeating these steps.

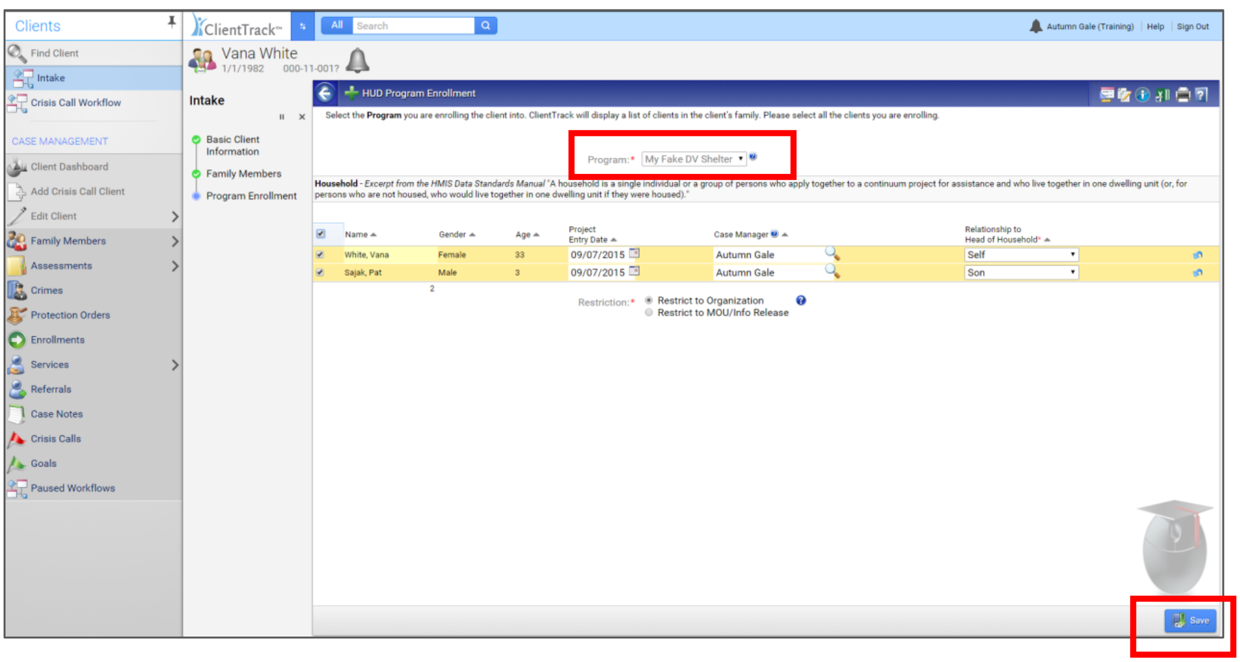




The system will automatically conduct a search for the new household member after you enter the first and last name. If the new household member is already in the system, click on the appropriate name in the search list that appears in the new window to attach the existing client record to the household. If the household member is a new client, click on **"Cancel"** in the search window and proceed entering the new household's information in the required data fields. Click **"Save & Close"** when finished adding household members.

Program Enrollment

Programs vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD data elements for your specific program. Please note that all fields with an asterisk * are required data fields and you will not be able to proceed in the workflow until all of the required information is completed.

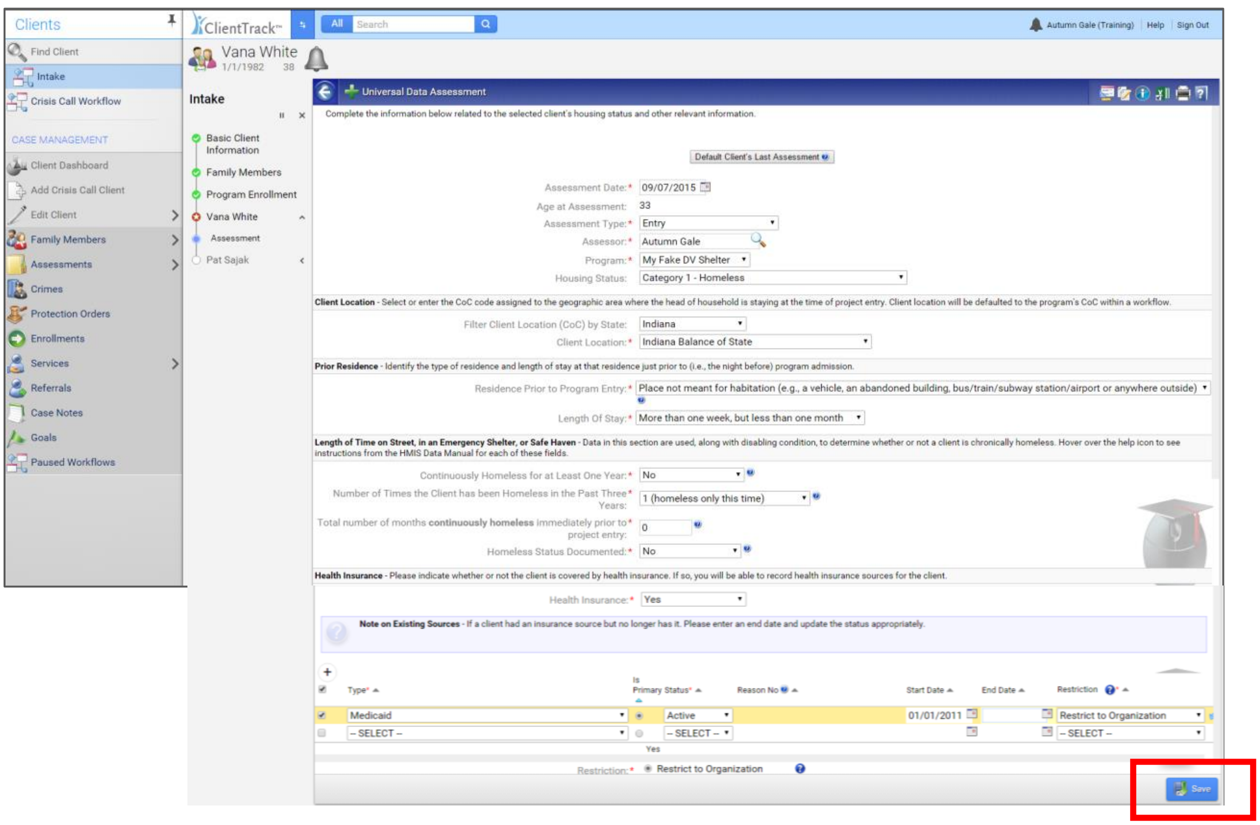


Select your **"Program"** with the drop down box and then select which household members to enroll by clicking on the box beside the client name. If a check mark appears by a client name on the program enrollment screen (as seen below), the client will be enrolled in your program. You can de-select a client by clicking on the check mark beside his/her name to remove the check mark and ensure the client is not enrolled.

> Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality, enter all client data in a timely manner.
>
> If you do not find your program option when enrolling a client, cancel the workflow by clicking the black "**X**" in the workflow screen found in the upper left-hand corner and please notify IHCDA immediately at DVHelpDesk@ihcdaonline.com. Program information must be set up in the system before you can begin to enroll clients.

Universal Data Assessment

Complete all the required data fields indicated by an asterisk * and click **"Save"** to continue.

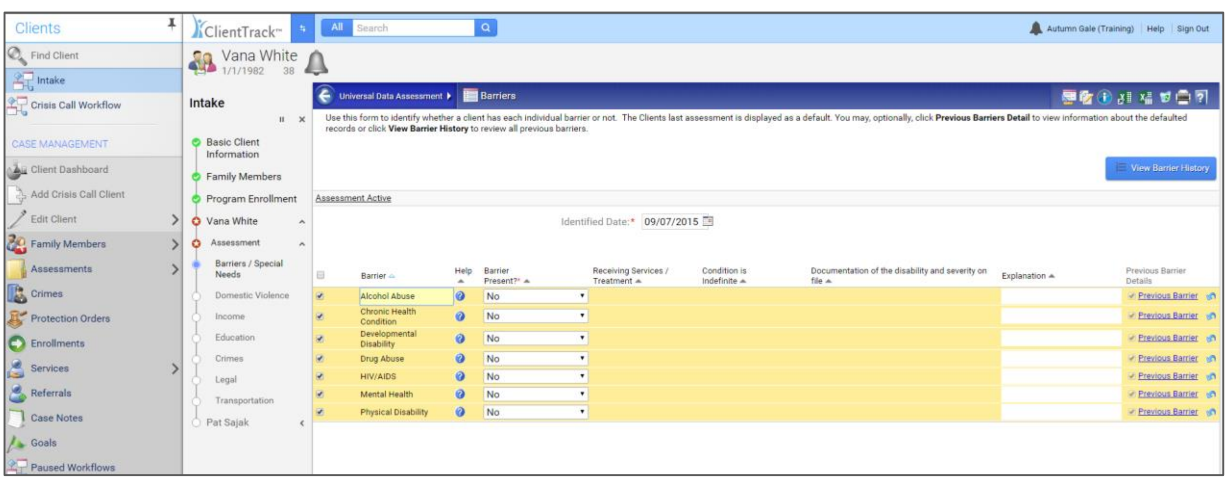


Definitions of Universal Data Requirements

- **Assessment Date –** Date the assessment was completed with the client (field will auto-fill with today's date).
- **In Permanent Housing –** Select "Yes" or "No" if the client is in permanent housing. This question is only asked for CoC, ESG, and SSVF Rapid Re-Housing clients.
- **Housing Status** – Choose the appropriate category for the housing status of the household. This is based on the household's housing condition just prior to project entry. More extensive definitions can be found by clicking on the blue information circle located in the upper right-hand of the screen beside the printer icon.
- **Residence Prior to Program Entry** – Identify where the client was staying on **the night before** the client is enrolled in your program.
- **Length of Stay** – Identify the length of stay for the residence prior to program entry.
- **Time on Streets, Emergency Shelter, or Safe Haven** – Data in this section are used along with disabling condition to determine whether or not a client is chronically homeless. *HUD strongly encourages HMIS users to just ask the client for the information and record the client's answer. Attempting to tie each individual response with definitions or documentation requirement is not the attempt of this question.*
- **Health Insurance Assessment** – Complete the required information pertaining to the client's insurance status.

Barriers Assessment

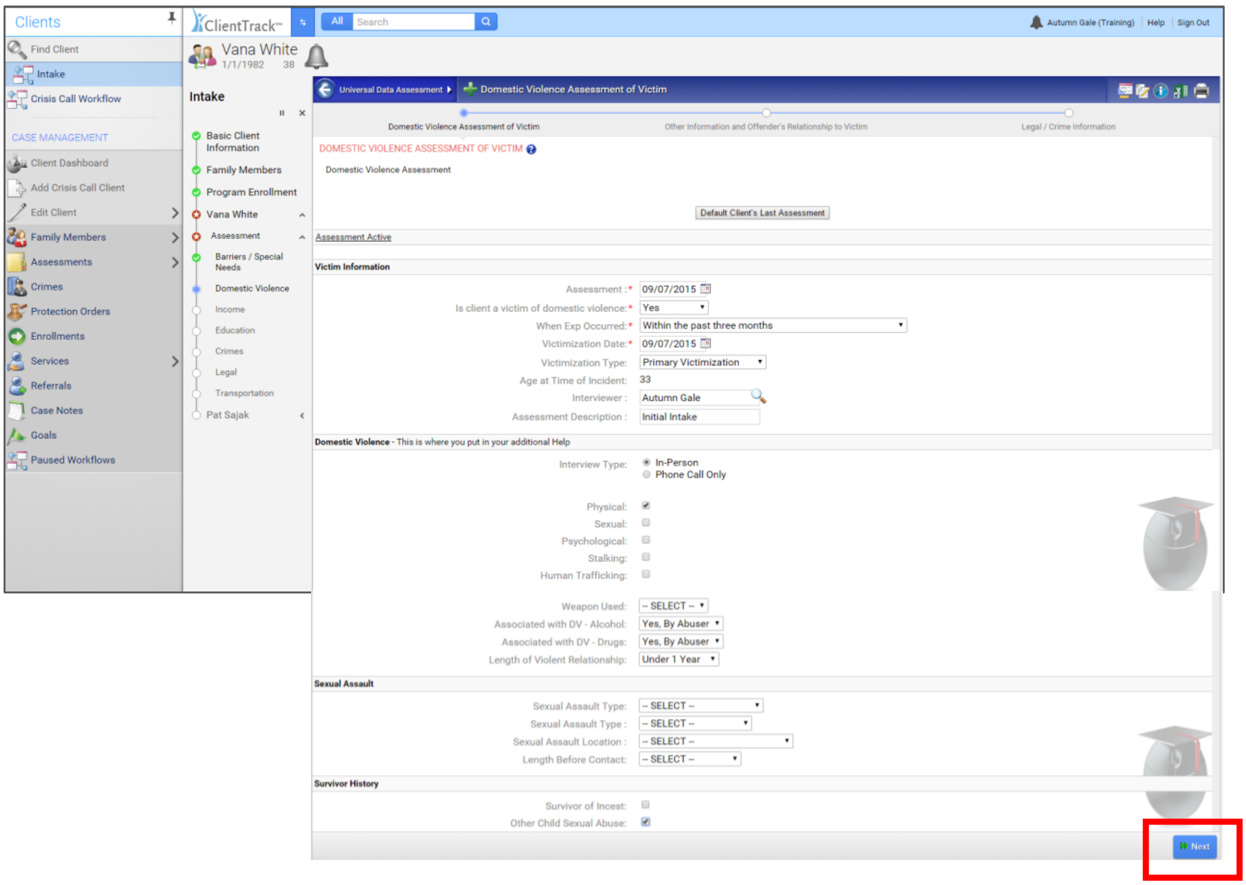
To select a barrier, click on the drop down box for **"Barrier Present"** and change the status to **"Yes."** The system defaults **"No"** for all barriers. Complete any required fields that appear after selecting that specific barrier. Please note that the date identified is the program enrollment date – the date the client presents to you and qualifies for enrollment. It is important to keep in mind that clients must have at least one barrier



to be eligible for some programs (such as Permanent Supportive Housing). If **no barriers** are present at enrollment, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**

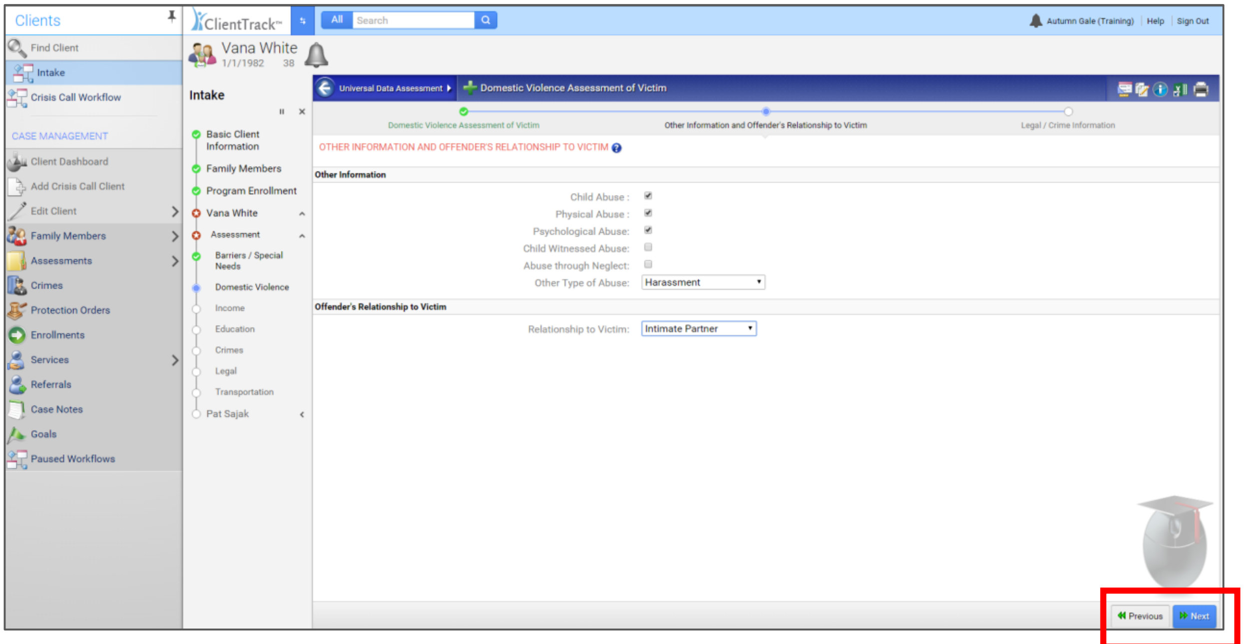
Domestic Violence Assessment

Complete the required information for the Domestic Violence Assessment. Please note that if domestic violence is reported and you select **"Yes"** for **"Domestic Violence Experience,"** you will be prompted for more information. Click **"Next"** to proceed in the workflow.

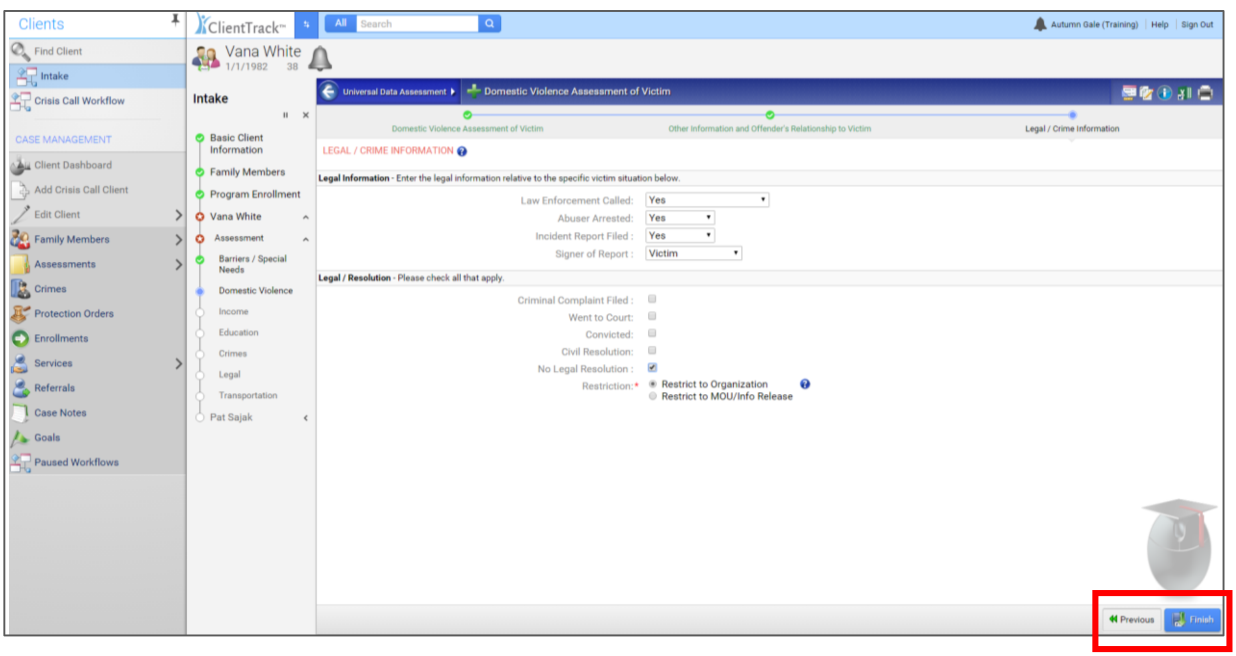


Domestic Violence Assessment Continued

Complete the requested information, noting that all fields with an asterisk * are required data elements. Click **"Next"** to proceed in the workflow.



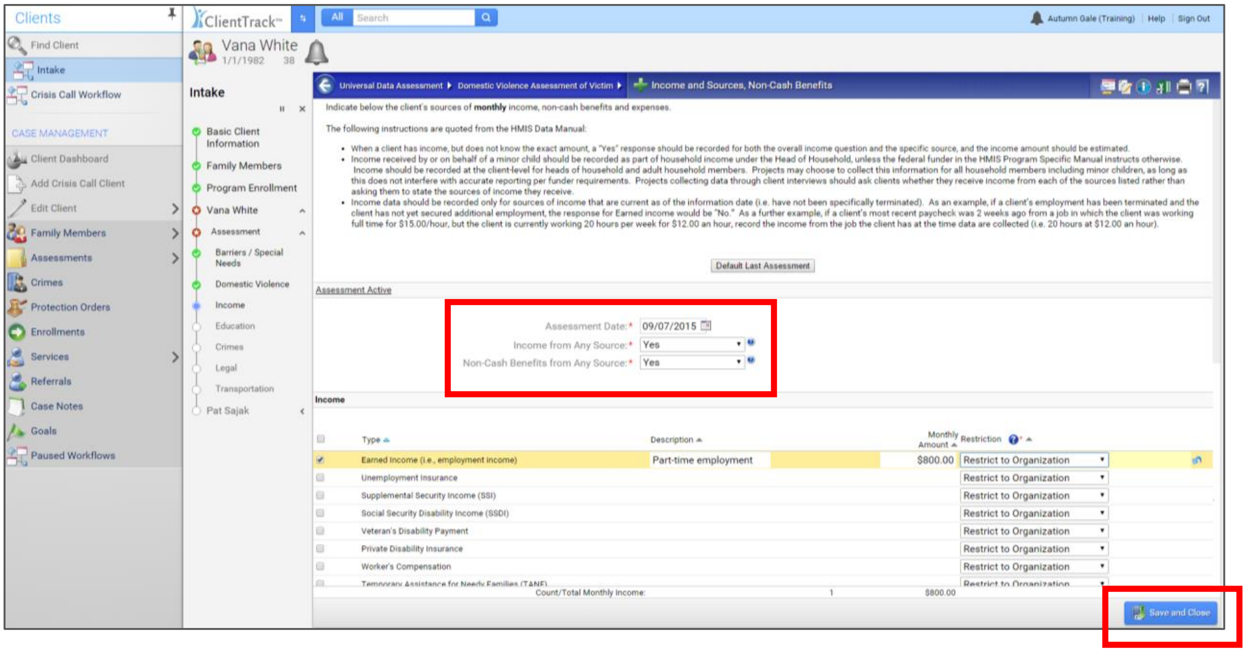
You will come to the last screen in the DV Assessment. Click **"Finish"** to complete the DV Assessment as seen below.



Financial Assessment

Complete the status for **"Income from Any Source"** and **"Non-Cash Benefits from Any Source"** with the provided drop down lists. If the status for either of these financial sources is **"Yes,"** you will be prompted to provide more information on the **"Type"** (definitions on below) of income/benefit and the **amount *(enter monthly amount)*** with the list that appears below the status after selecting **"Yes."** Please note that Non-Cash Benefits will appear below Income and you will need to scroll down to input that information.

Also input any income a child may receive (i.e., SSDI) on the head of household's income/benefits information. You will not complete a Financial Assessment for children in the household.

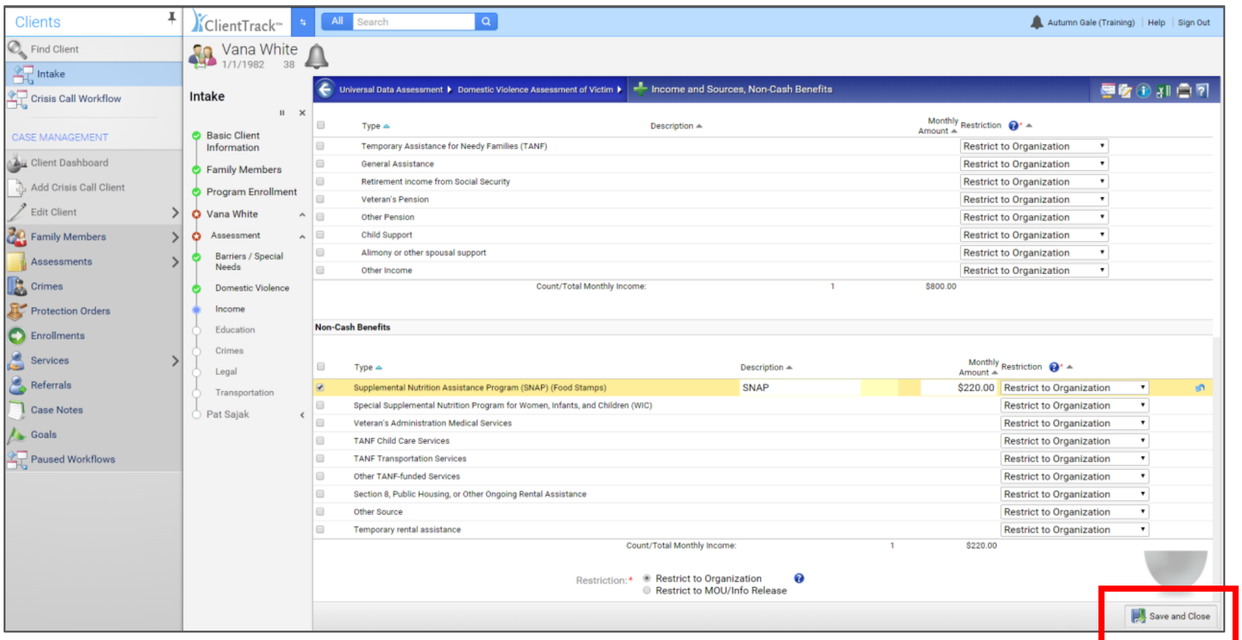


Definitions of Sources of Income

- **Earned Income** – Employment income
- **Private Disability Insurance** – Income received from private disability insurance
- **Unemployment Insurance** – Unemployment benefits from the State
- **Worker's Compensation** – Income for an individual who has been injured on the job
- **Pension From Former Job** – Income from a private employer or military retirement pay
- **Supplemental Security Income** – A federal program providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** – Income payment provided by government for individuals who qualify
- **Alimony** – Income received for spousal/partner support

Definitions of Sources of Income Continued

- **VA Service-Connected Disability** – A benefit paid to a veteran because of injuries or diseases that happened while on active duty or were made worse by active duty
- **VA NonService-Connected Disability -** To assist wartime veterans in need whose non-service-connected disabilities are permanent and total preventing them from following a substantially gainful occupation.
- **TANF** –Temporary Assistance for Needy Families
- **Child Support** – Income received from one parent to another to care for children
- **Other Income** – Any income not previously listed

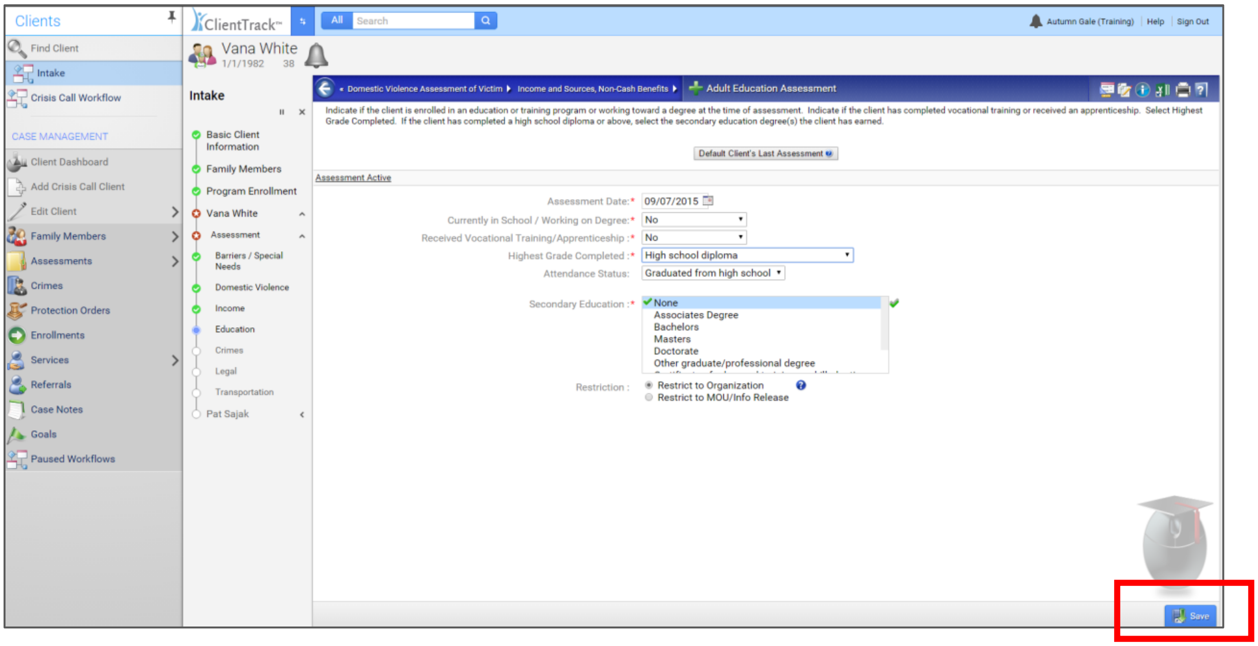


Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Child care funding assistance
- **TANF Transportation Services** – Transportation funding assistance
- **Other TANF Funded Services**
- **Section 8, Public Housing or Other Rental Assistance (PSH)** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.
- **Temporary Rental Assistance (RRH)** – ESG rental assistance
- **Other Source** – Any source not previously listed above.

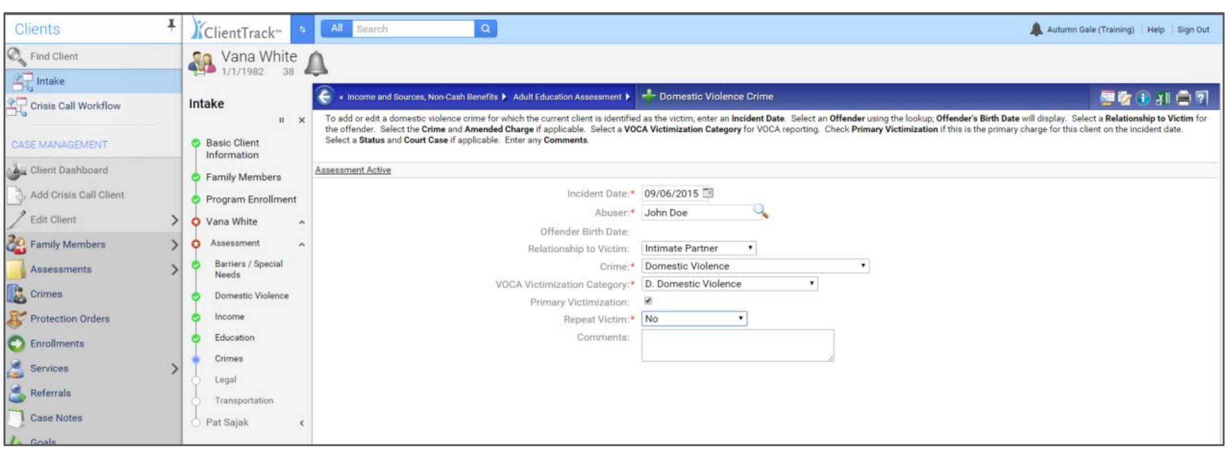
Adult Education Assessment

Complete the required information on the Adult Education Assessment. An education assessment will be prompted for each adult and child in the household. Click **"Save"** to continue in the workflow.

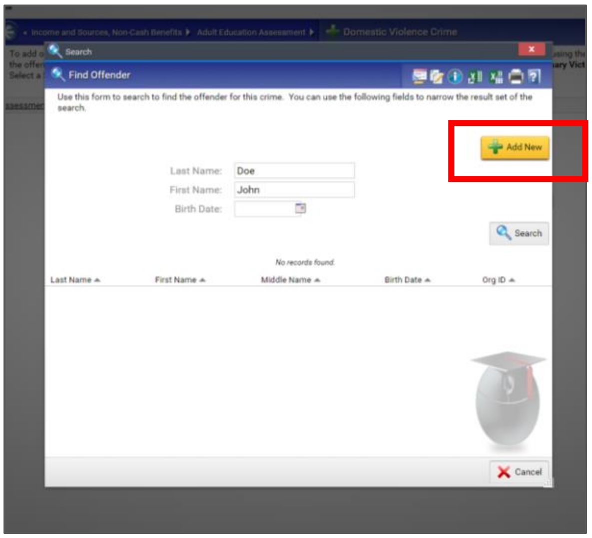


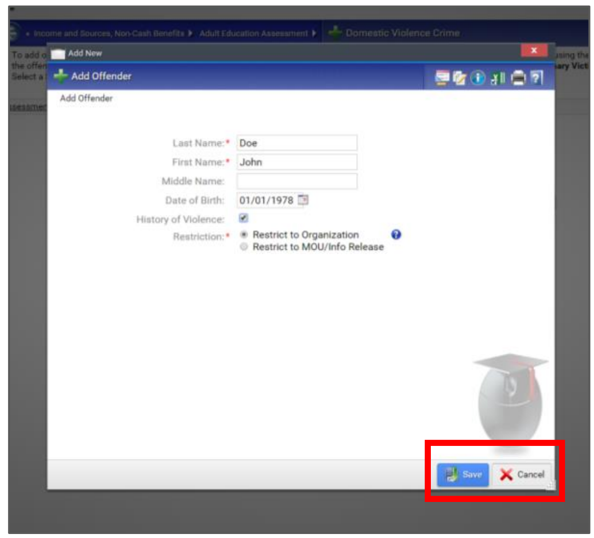
Crimes Assessment

Complete the requested information, noting that all fields with an asterisk * are required data elements. You may also click **"Skip"** if the data is not collected or required.



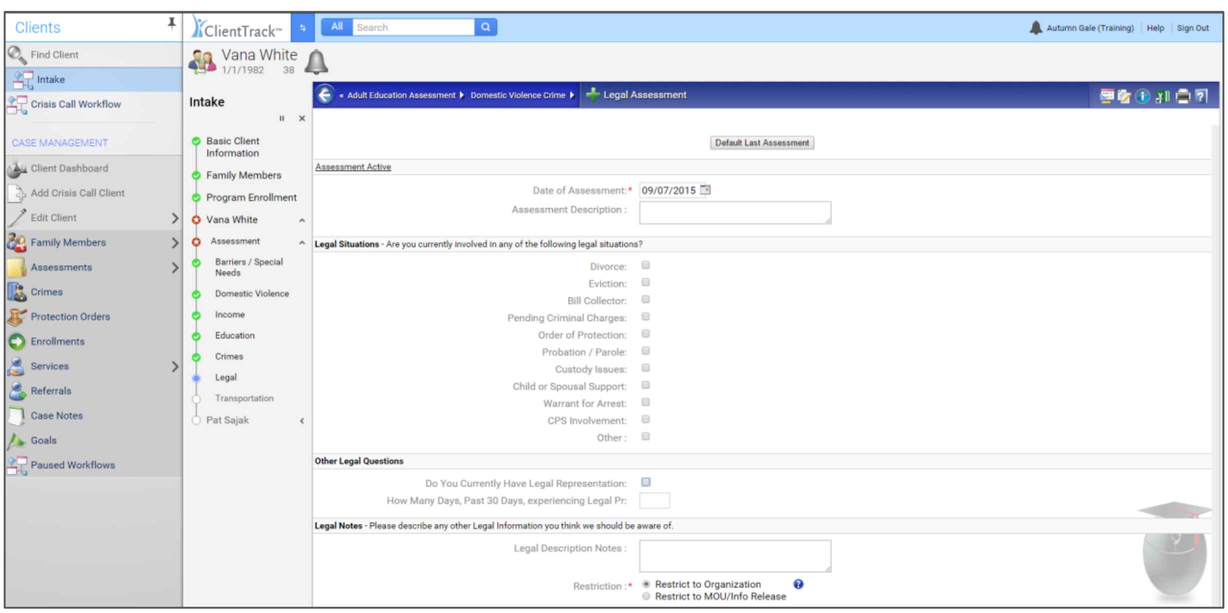
When you enter the **"Abuser"** name, the system will automatically conduct a search for the person in the system. If this person is a new **"Abuser,"** you can click on the **"Add New"** button to add the new name to the database. Complete all of the required information and click **"Save"** to save the person's name to the database. When finished adding information to the Crimes Assessment, click **"Save"** or **"Skip"** to move forward in the workflow.





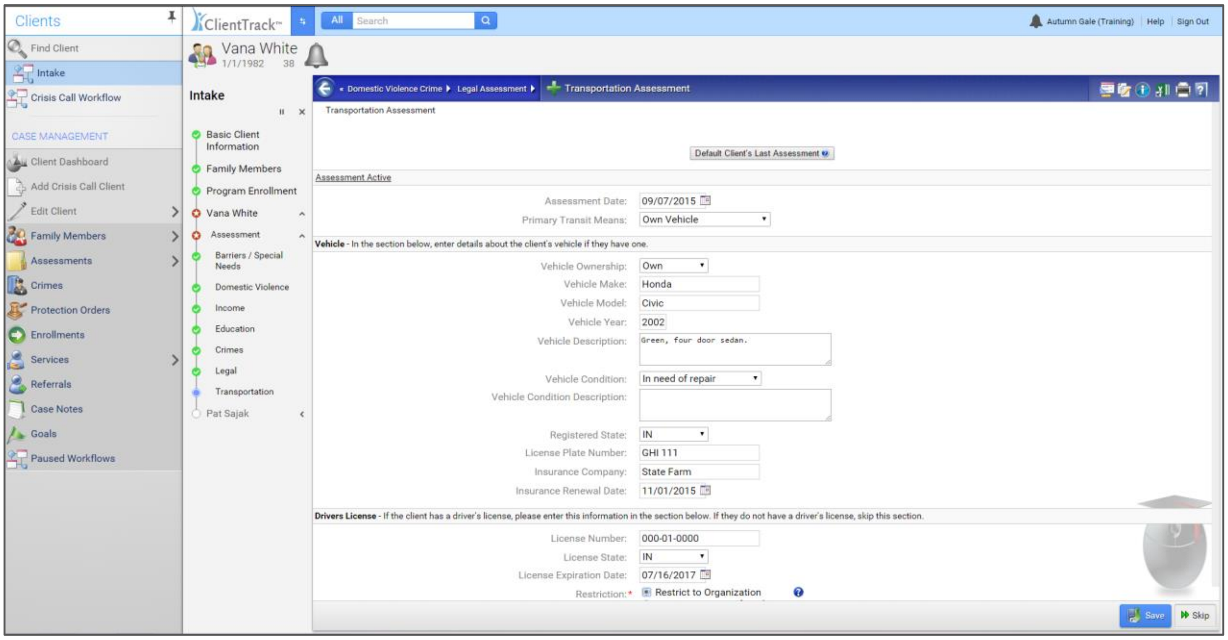
Legal Assessment

Complete the requested information, noting that all fields with an asterisk * are required data elements. You may also click **"Skip"** if the data is not collected or required.



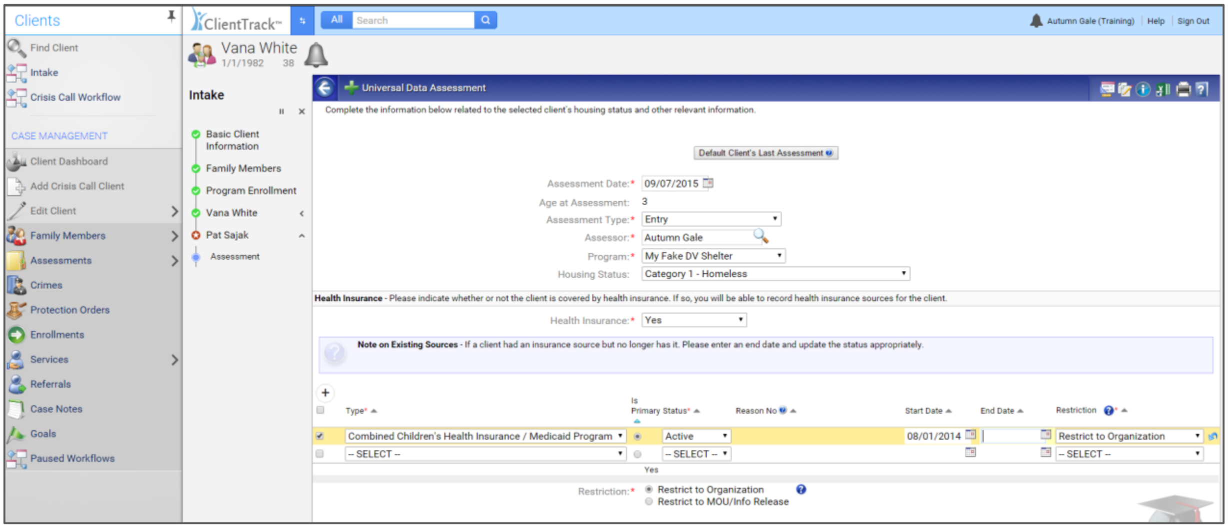
Transportation Assessment

Complete the requested information, noting that all fields with an asterisk * are required data elements. You may also click **"Skip"** if the data is not collected or required.



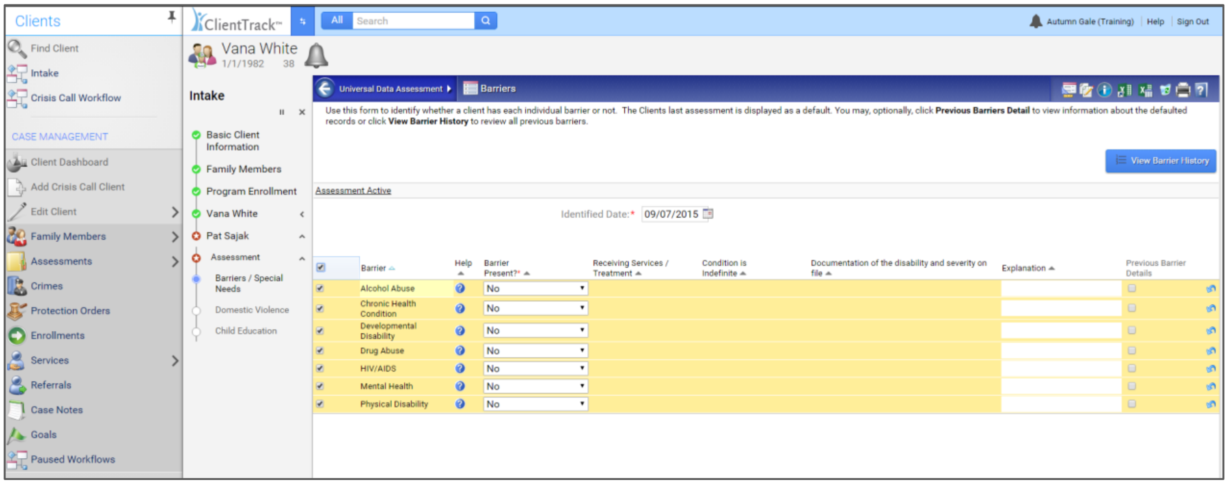
Universal Data Assessment for Child

Complete the required data elements for the child on the HMIS Universal Data Assessment. You will notice that the child's assessment does not require as much information as the adult's assessment. Click **"Save"** when finished with the assessment to continue in the workflow.



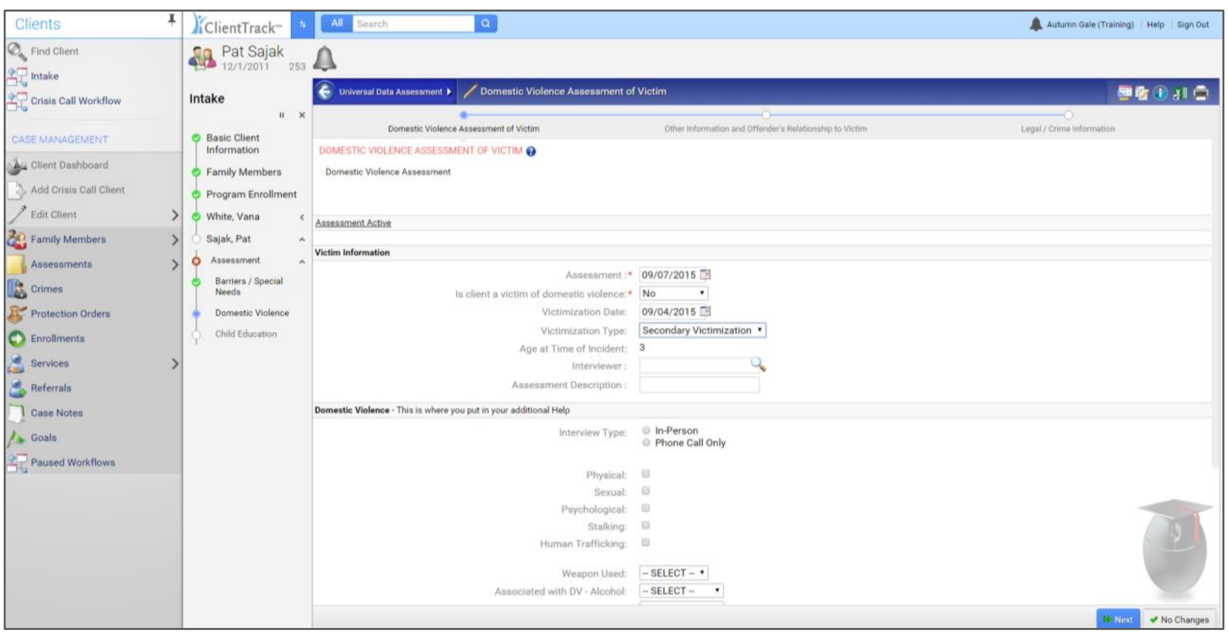
Barriers Assessment for Child

Complete any barrier information for the child you are enrolling. If **no barriers** are present at enrollment, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**

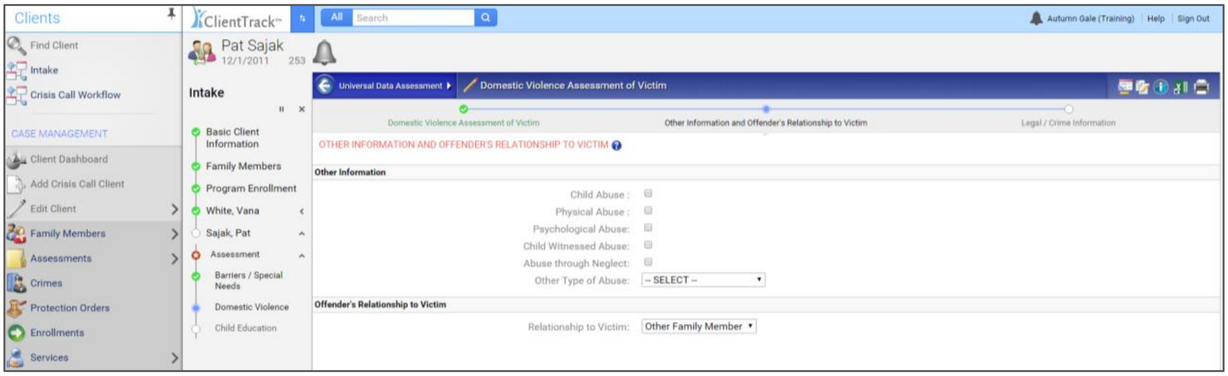


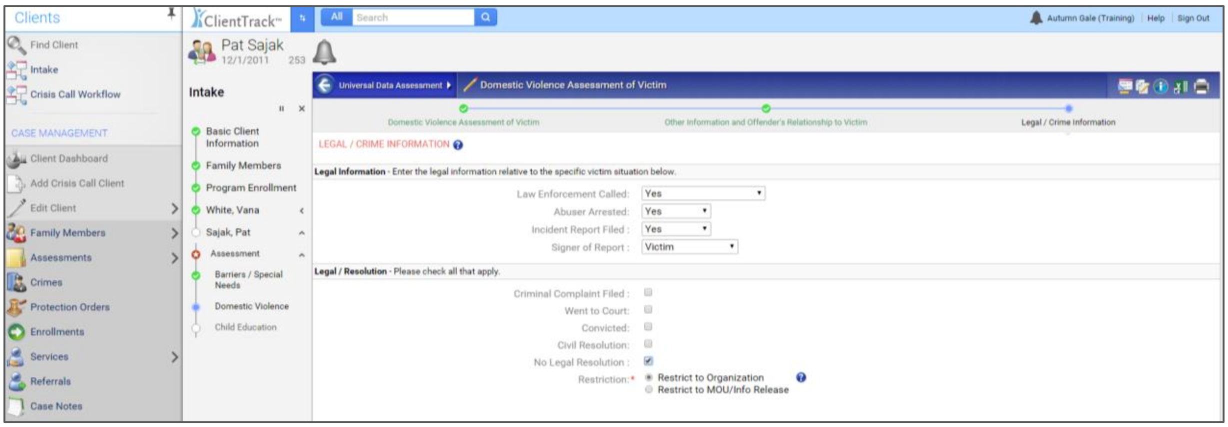
Domestic Violence Assessment for Child

Complete the requested information, noting that all fields with an asterisk * are required data elements. Click **"Next"** to proceed in the workflow.



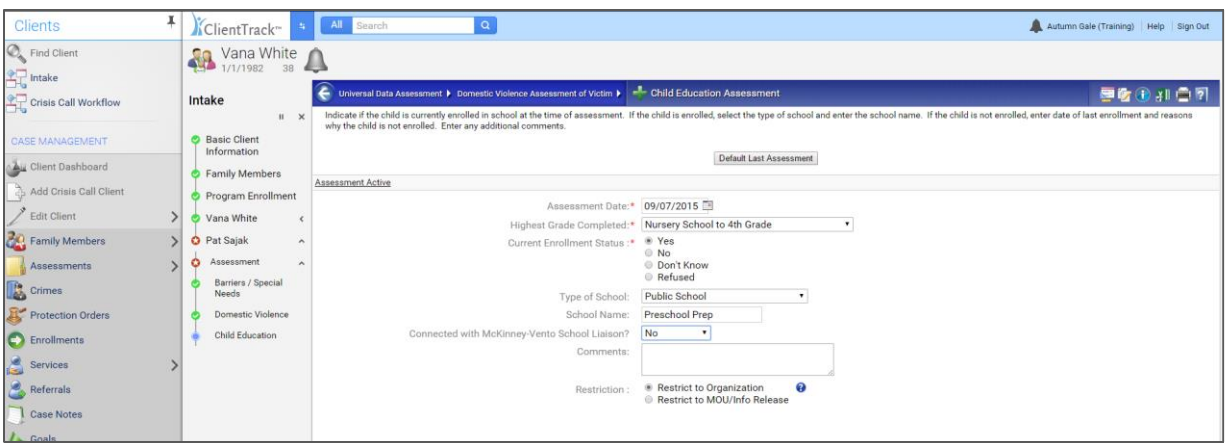
Domestic Violence Assessment for Child Continued



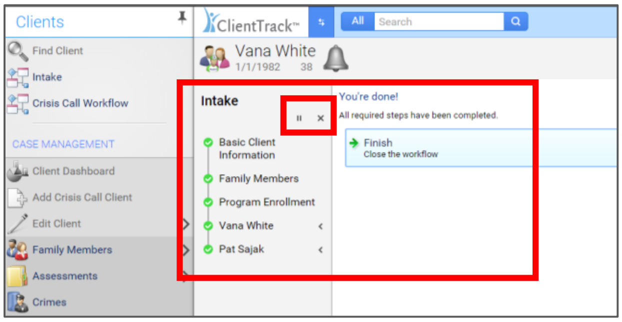


Child Education Assessment

Enter the "**Highest Grade Completed**" for the child, and then select if the child is "**Currently Enrolled in School.**" The built in logic may require additional information depending on how you answer the questions. Click "**Save**" when completed.



Completing the Intake Workflow

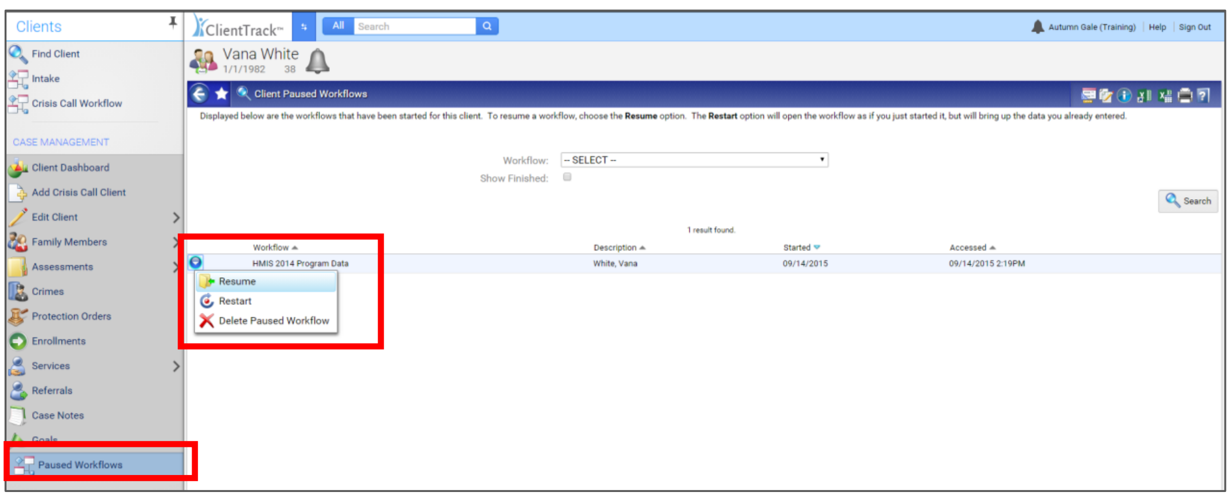


Once you have completed the required entry assessments for your client and household members, you will be prompted to **"Finish"** the workflow. If the workflow is complete then click **"Finish."** You will then be directed back to the head of household's client record and you can see the new enrollment under the **"Enrollments"** section on the client record.

If you need to go back and change information entered in the workflow prior to finishing, you can click on the specific section of the workflow you wish to return to in the workflow window that appears in the upper left-hand corner of the client record (outlined in red above). Clicking on the link beside the green dot will take you to that specific section of the workflow where you can edit information.

Pausing a Workflow

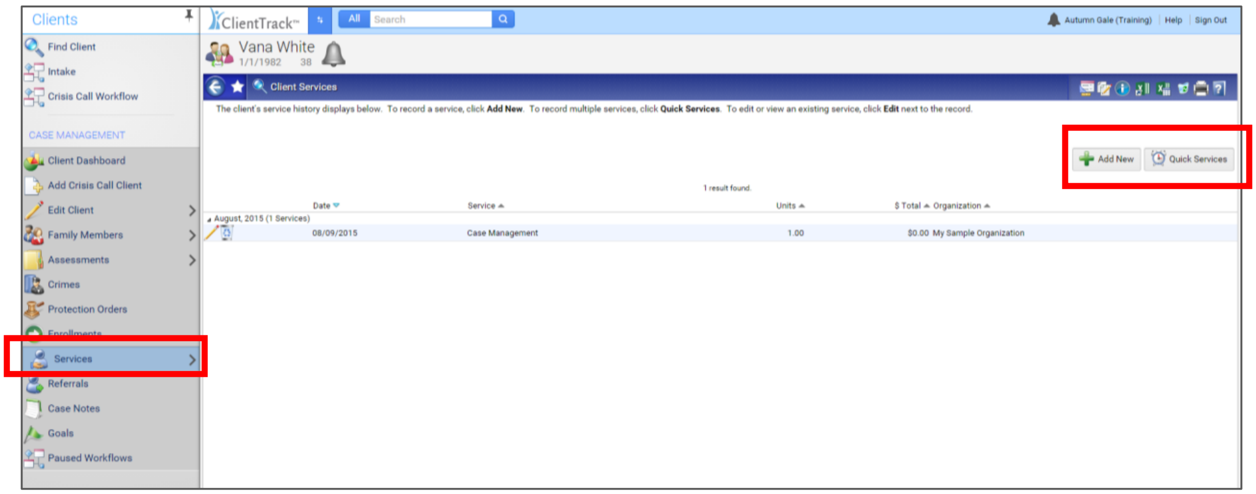
You may also **"Pause"** a workflow by clicking on the pause button located in upper right-hand corner of the workflow window beside the black **"X"** (outlined in red above). The black **"X"** will delete the workflow. The pause feature will allow you to pause the workflow at any time so you can return to it later.



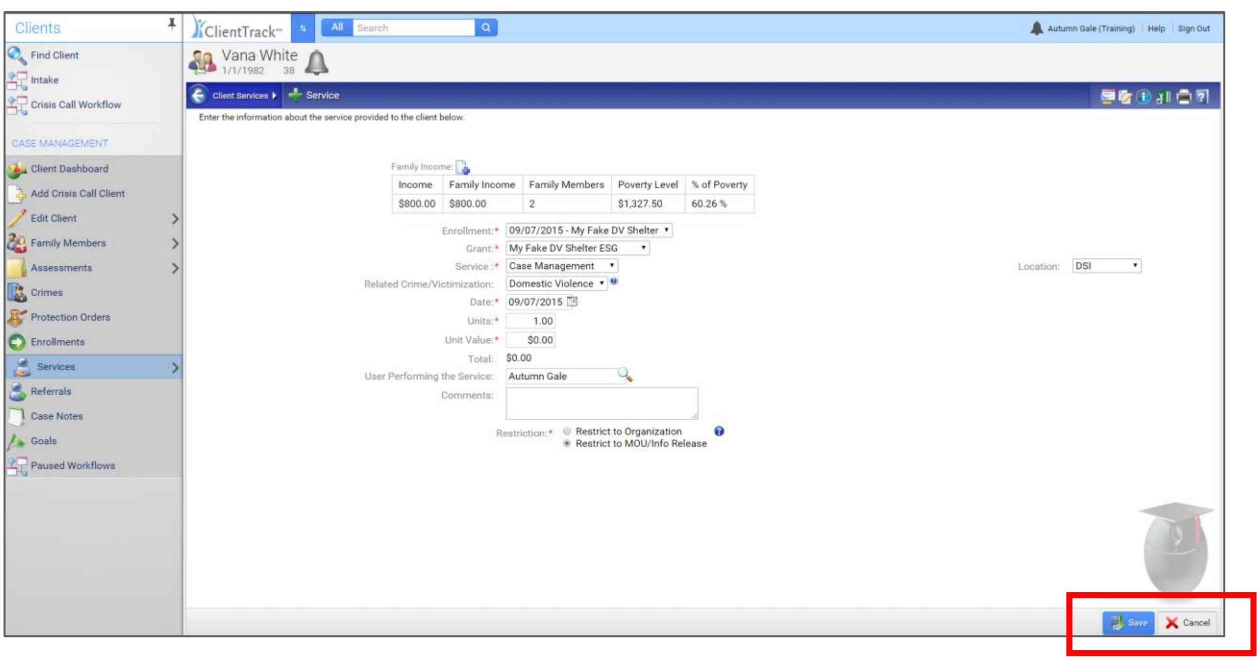
To **resume a paused workflow**, click on **"Paused Workflows"** at the bottom of the list of case management tools located on the left-hand side of the client record. Then click on the blue play button beside your paused workflow to select **"Resume"** in the drop down. This will take you to where you paused the workflow and you can finish your program enrollment.

ADDING SERVICES

After completing an enrollment for a client, you can document services associated with the program enrollment with the "**Services**" link located in the list of case management tools on the left-hand side of the client record. This will open the Services window where you can "**Add New**" services or manage current services.



To document a new services, click on **"Add New."** You will see the Services home screen where you select the enrollment associated with the service and the service provided. You can also enter units (1.00 unit = one hour of case management or a bus pass) to track costs. The comments section can be used for reminders; however, this is not an area for case notes. Case Notes will be covered later in the manual.

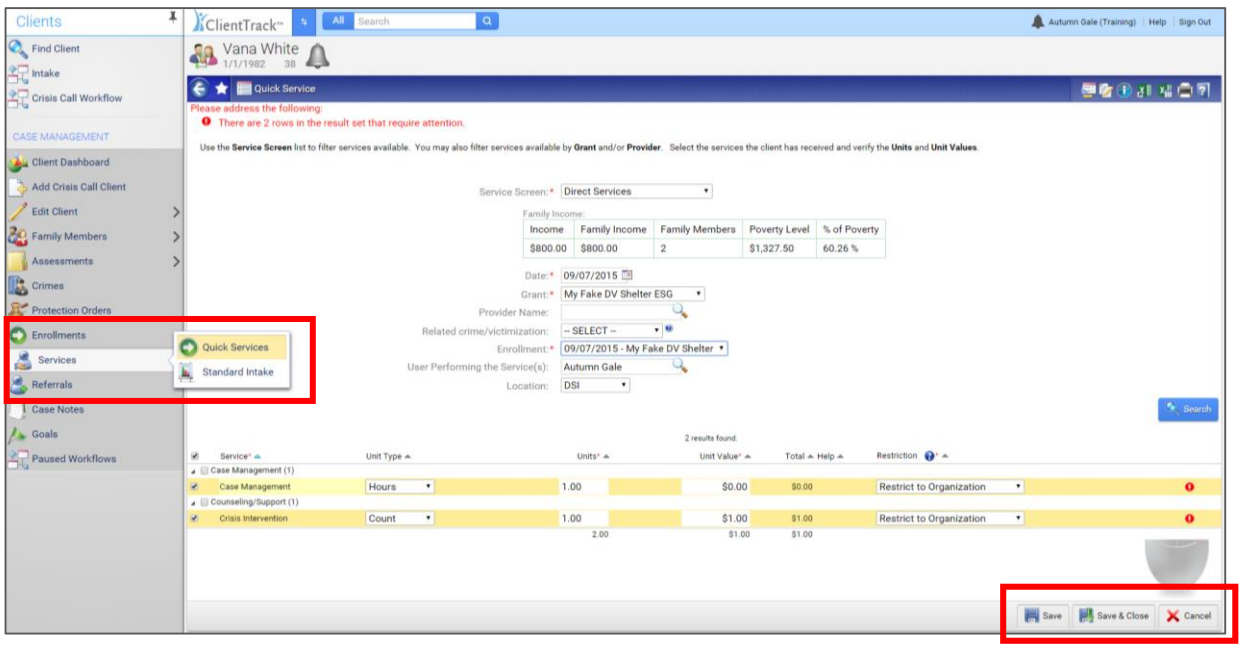


Please note that services can be tailored to your organization's needs. If a service does not appear in your agency's options, contact the help desk to request that it be added.

When you are finished documenting a service, click on the "**Save**" button and you will be taken back to the Services window where you can edit or delete a service you created.

Quick Services

When you need to add more than one service and the services were provided on the same date, you can use the **"Quick Services"** option to document all of the services at the same time. The **"Quick Services"** button is located beside the **"Add New"** button on the Services window or when hovering over the **"Services"** link in the list of case management tools. With this feature you can add multiple services to a client record at one time by selecting the "**Enrollment**" and checking the services with the "**Check Box**" next to the service you provided.

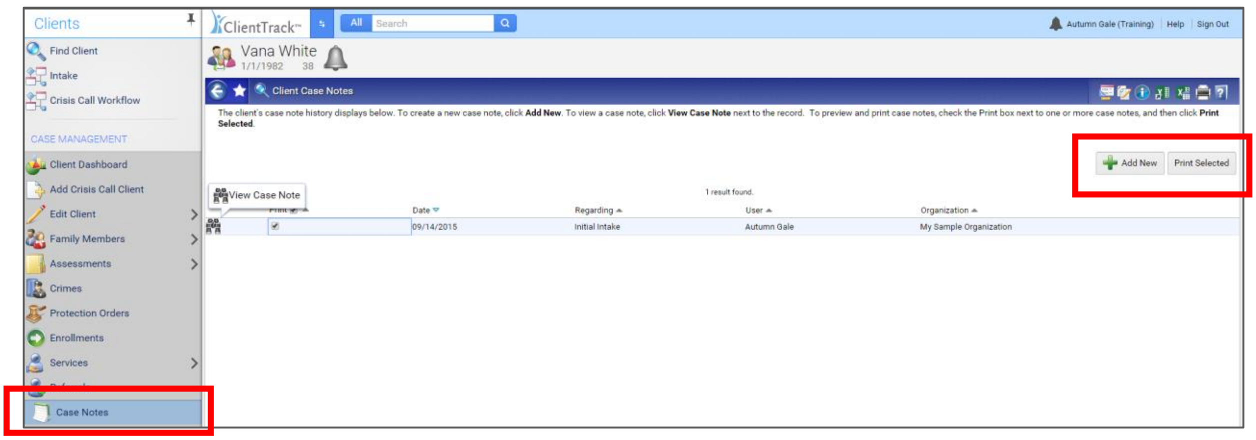


Once you are finished adding multiple services click on the "**Save & Close**" button and you will return to the Services window where you can view and manage services. Please note that some initial set up may be required to utilize this feature. You can also tailor your services, so contact the help desk if you need assistance with the Quick Services feature.

CASE NOTES

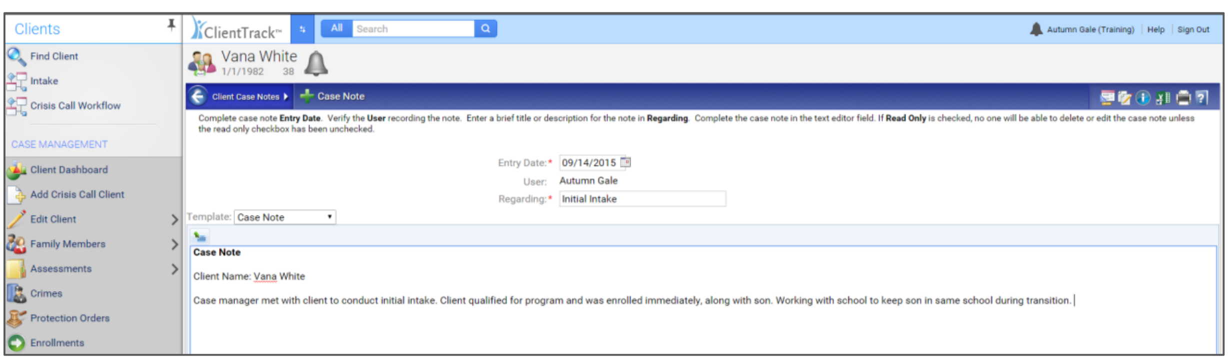
Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls and other relevant information regarding your client are properly documented in case notes.

To add case notes, click on the "**Case Notes**" link in the list of case management tools on the left-hand side of the screen. Click on the "**Add New**" button on the upper right-hand side of the screen.

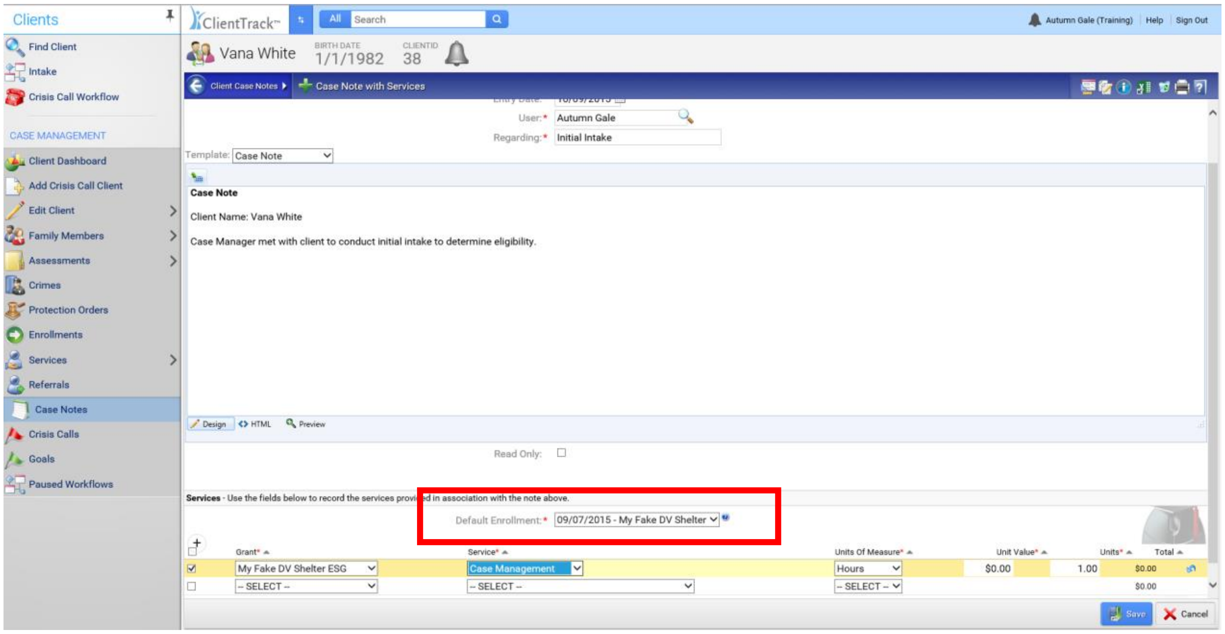


Any case notes created for a client are restricted to case managers within your organization. No one outside of your agency can view your case notes.

An example of a case note is below as well as an example of a case note with the option to document a service simultaneously (seen on the next page). Templates can also be set up for housing plans or any other specific required documentation so it can easily be drafted as a case note. Notify the help desk with any template requests.



Once a case note is created, it will appear in a list of case notes on the Case Notes home screen. You can click on the binoculars beside a case note to review it. You can also select case notes to print by clicking on the **"Print"** box located in the far column and clicking on the **"Print Selected"** button beside the **"Add New"** button as seen on the previous page. This will print all of the "checked" case notes.

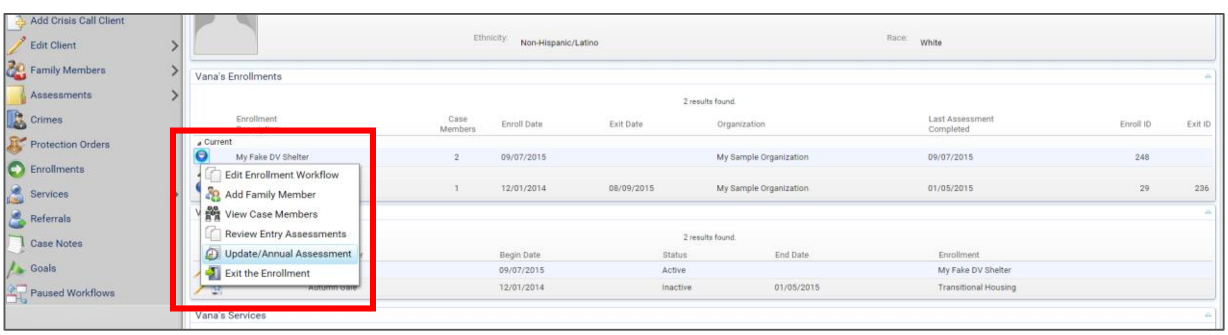


UPDATE/ANNUAL ASSESSMENT

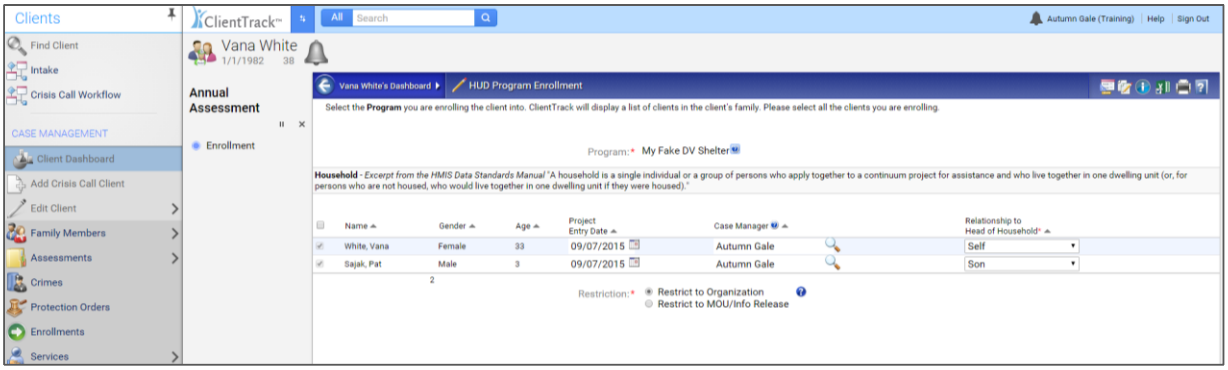
For clients who spend longer periods of time in your program or to document any changes in your client's status since entry, you can conduct an **"Update/Annual Assessment"** formerly known as the During Program Enrollment Assessment. This assessment is required if clients are enrolled in your program for a year or longer, and some programs require more frequent assessments so be sure to check your program requirements for the Update/Annual Assessment.

The Update/Annual Assessment is also helpful for tracking significant changes to a household – for example a client gets a job and the income changes or a client receives his/her GED. For your convenience, the assessment has been developed as a workflow with the following steps:

- Click on the blue play button beside your program enrollment;
- Select **"Update/Annual Assessment"** from the drop down list; and
- Complete the required assessments prompted by the workflow and save as you go.

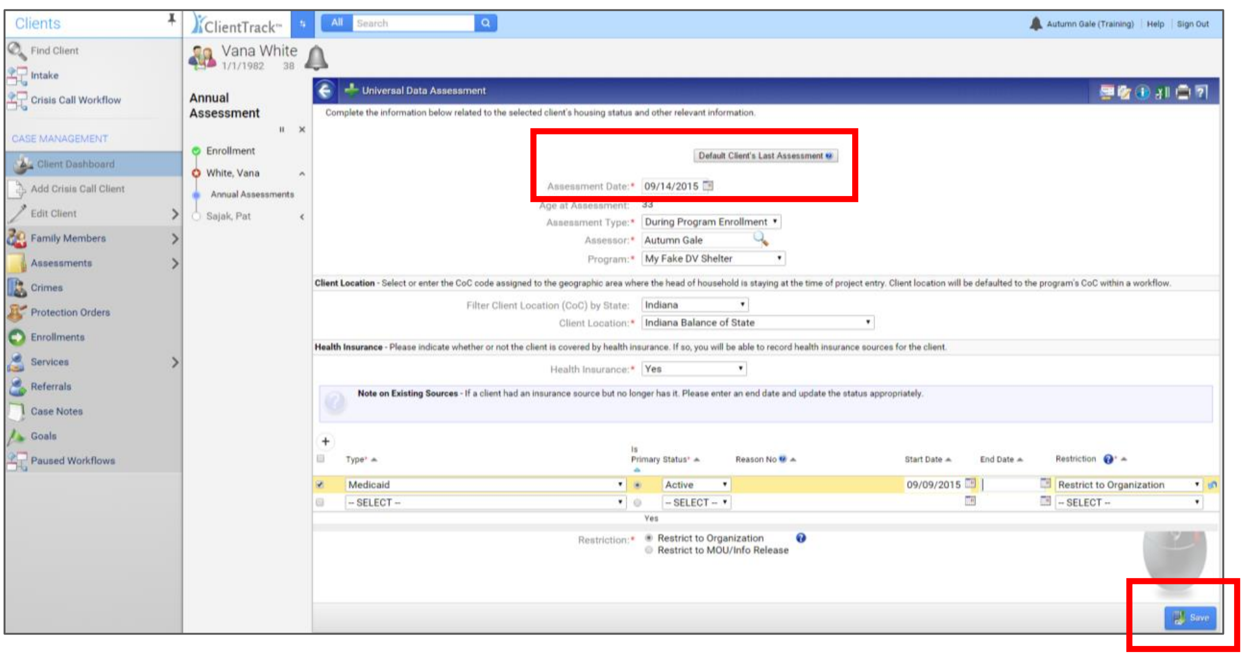


The first screen you will be taken to will review the household members and the enrollment. Click **"Save"** or **"No Changes"** in the bottom right-hand corner to continue in the workflow.



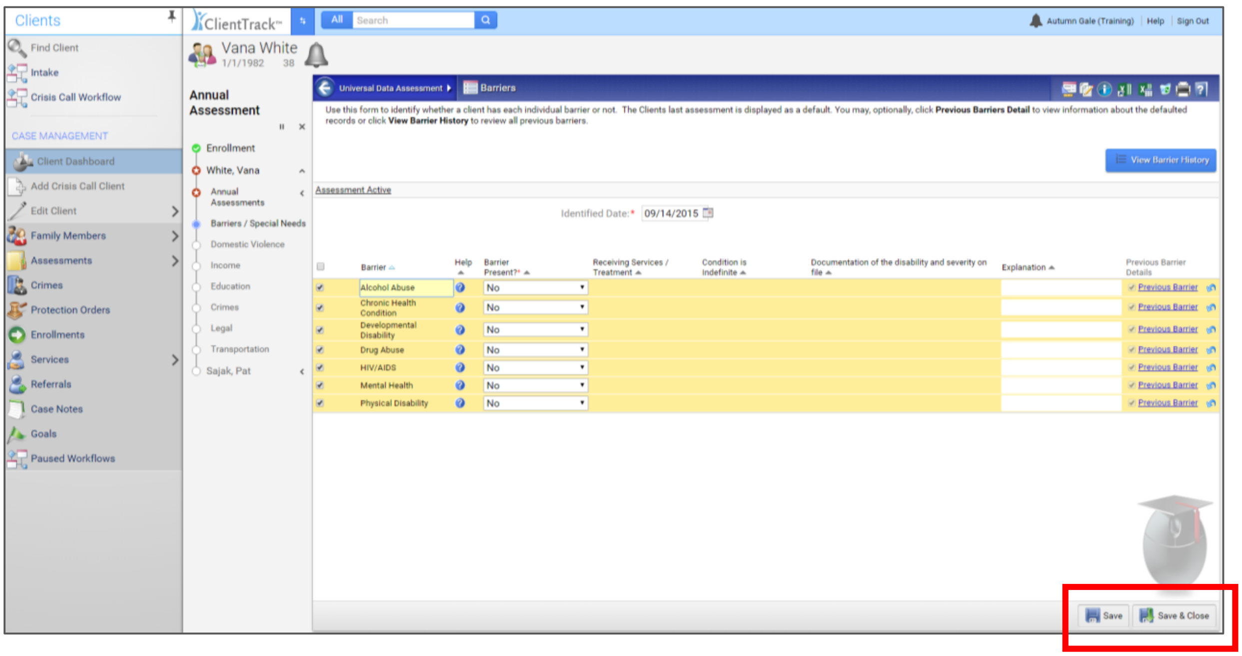
Universal Data Assessment

You will then review the head of household's universal data where you can document any changes. Please note that you can change the assessment date at the top of the screen to reflect the actual date of the assessment if done at another time. You may also use the **"Default Last Assessment"** button at the top of the screen if the data that was entered on the last assessment has remained the same.

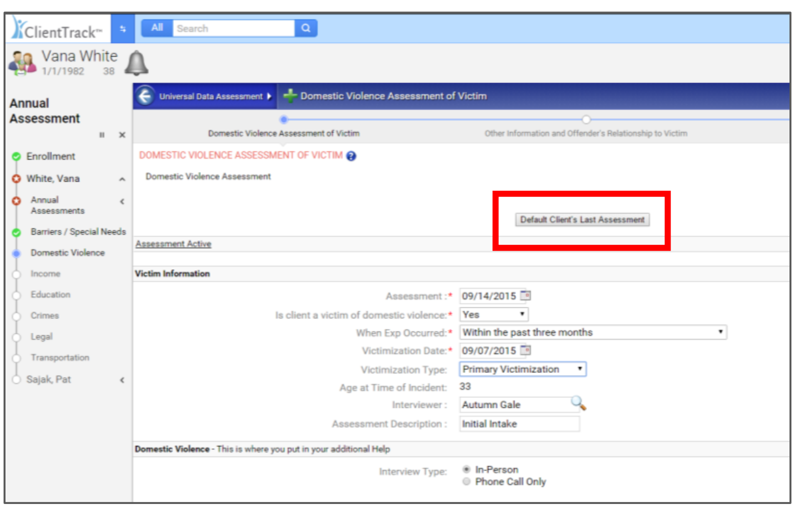


Barriers Assessment

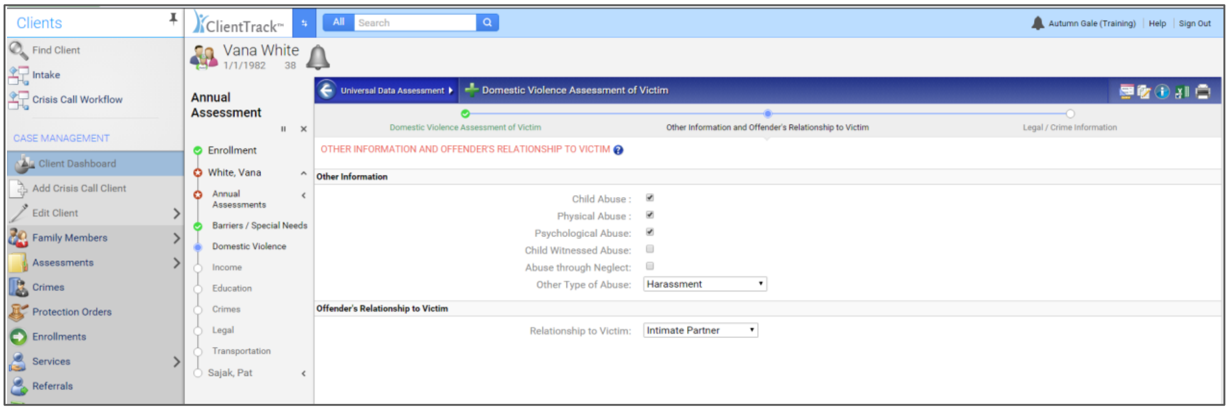
Review the HMIS Barriers and make any changes necessary. You may use the **"Default Last Assessment"** button at the top of the screen if the data that was entered on the last assessment has remained the same. This is a helpful feature if an assessment requires significant data entry. It will populate all of the information previously entered for you. If **no barriers** are present at this time, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**



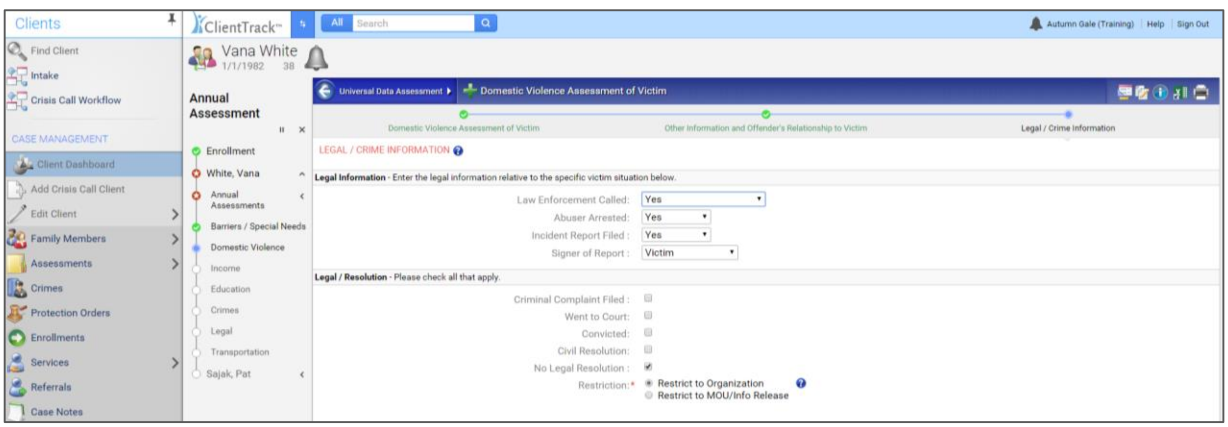
Domestic Violence Assessment



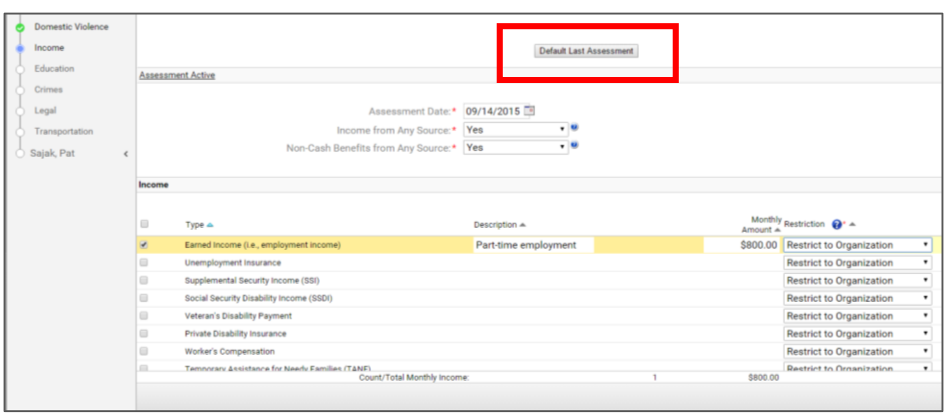
Review the Domestic Violence assessment for the head of household and document any changes. You may click on the **"Default Last Assessment"** button at the top of the assessment to populate the client's information previously entered. Be sure move through the entire assessment and click **"Save and Close"** when finished.



Complete all of the sections of the Domestic Violence Assessment. All fields with an asterisk * are required fields. Make any changes necessary and click **"Next"** to prompt through the assessment. Once all of the Domestic Violence Assessment has been completed, click **"Finish."**



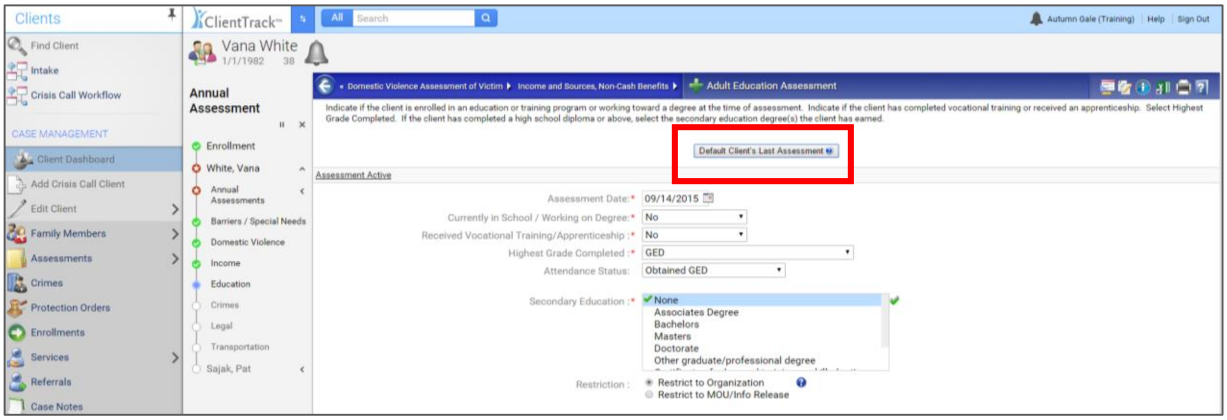
Financial Assessment



Review the Financial information for the head of household and document any changes to the household income. Be sure to scroll down to complete the Non-Cash Benefits if applicable and click **"Save and Close."**

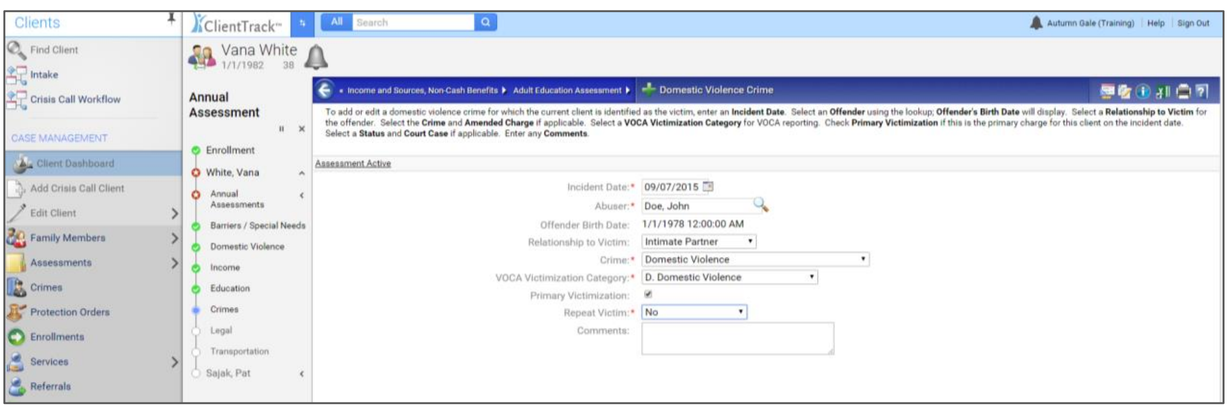
Adult Education Assessment

Complete the Adult Education Assessment. Remember that all fields with an asterisk * are required. The **"Default Client's Last Assessment"** will populate information from the previous assessment completed and is helpful if the client's information has not changed. Click **"Save"** when finished.



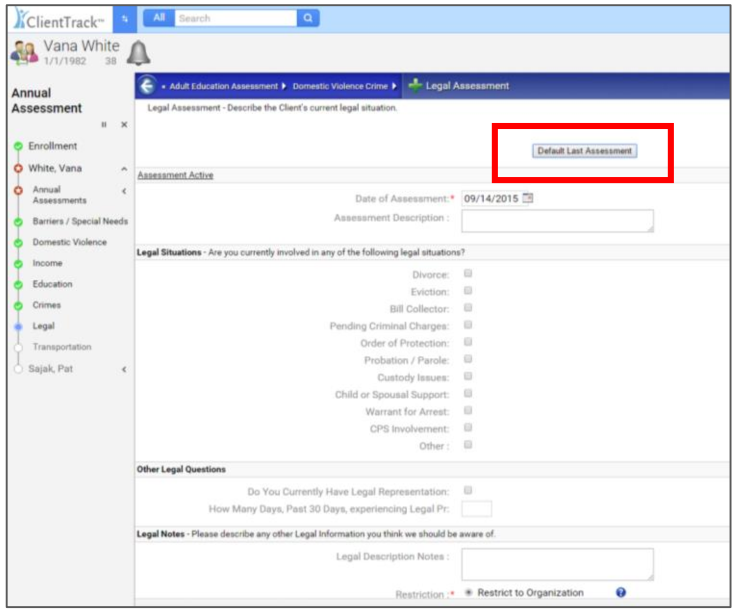
Crimes Assessment

Complete the requested information, noting that all fields with an asterisk * are required data elements. You may also click **"Skip"** if the data is not collected or required.



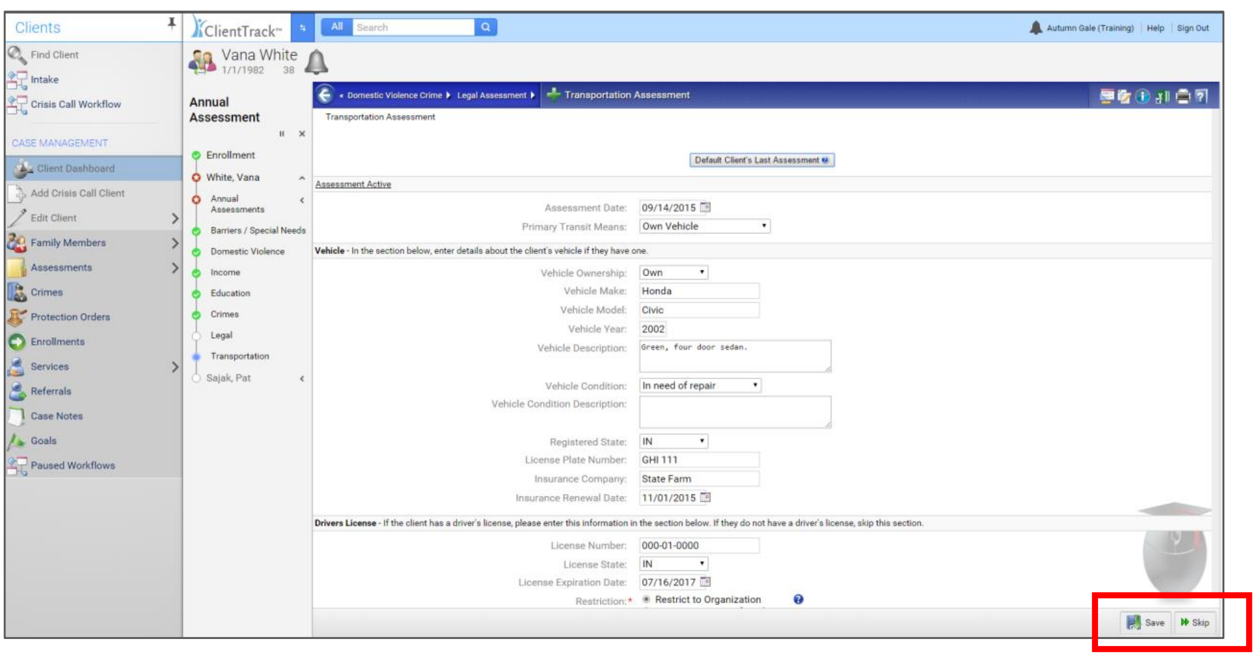
Legal Assessment

Complete the requested information, noting that all fields with an asterisk * are required data elements. You may also click **"Skip"** if the data is not collected or required.



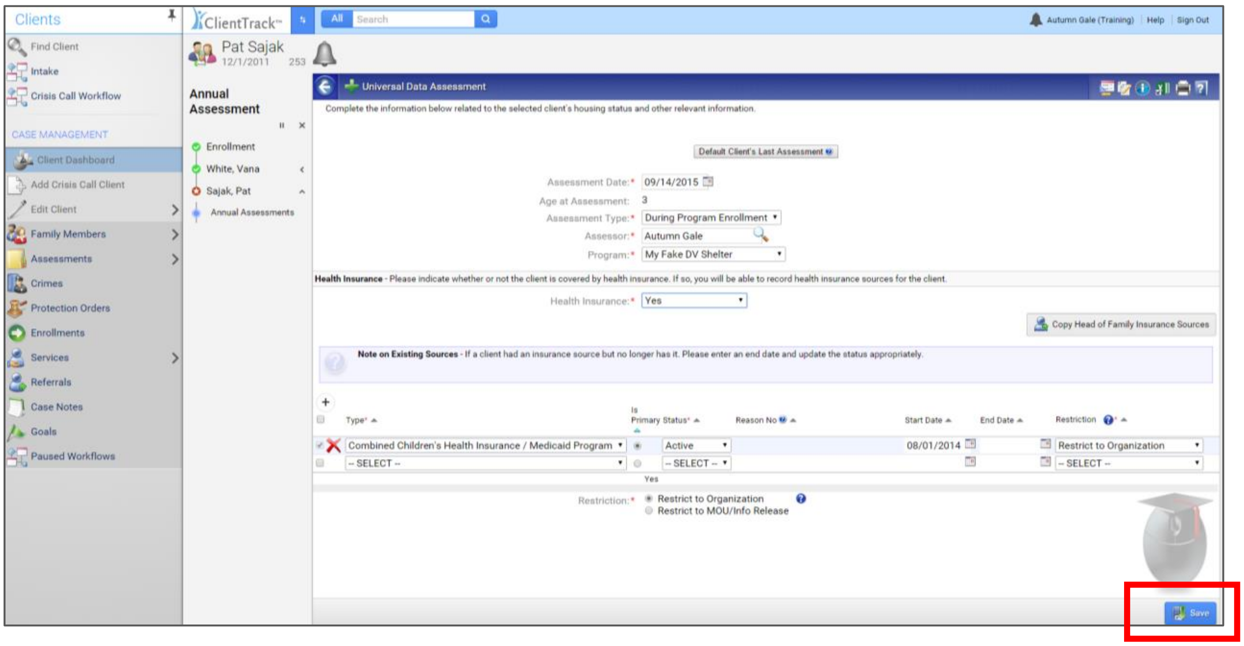
Transportation Assessment

Complete the requested information, noting that all fields with an asterisk * are required data elements. You may also click **"Skip"** if the data is not collected or required.



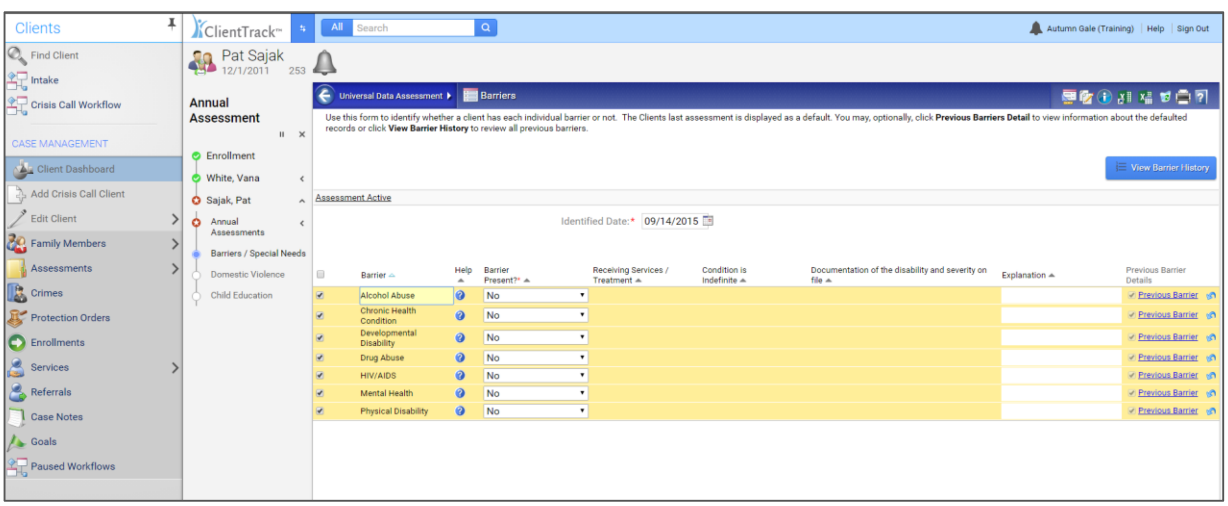
Universal Data Assessment for Child

After completing all of the updated assessments for the head of household, you will be prompted through the assessments for all enrolled household members. The adult assessments will look like the head of household's assessments. The Update/Annual Assessment will look differently for children.



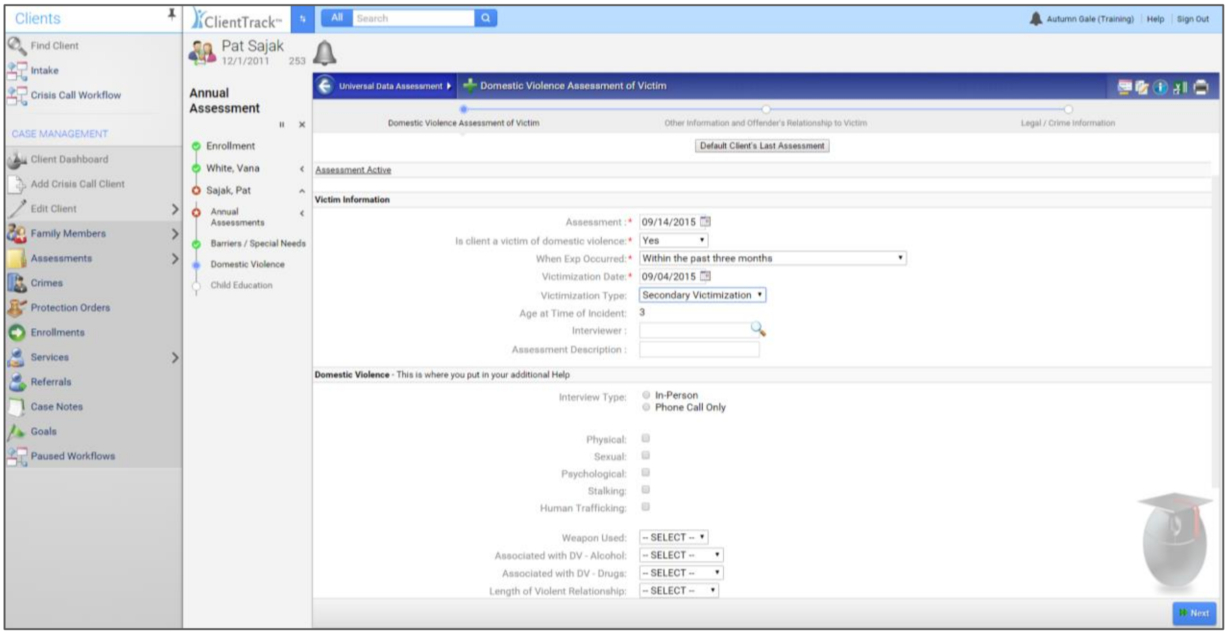
Barriers Assessment for Child

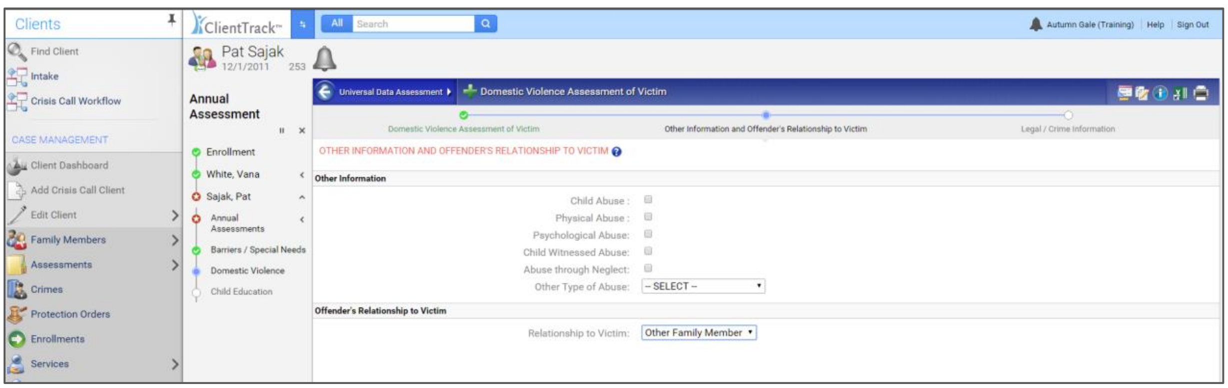
Complete the Barriers Assessment for the child. If no barriers are reported, click **"Save & Close"** to continue in the workflow. If **no barriers** are present at this time, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**



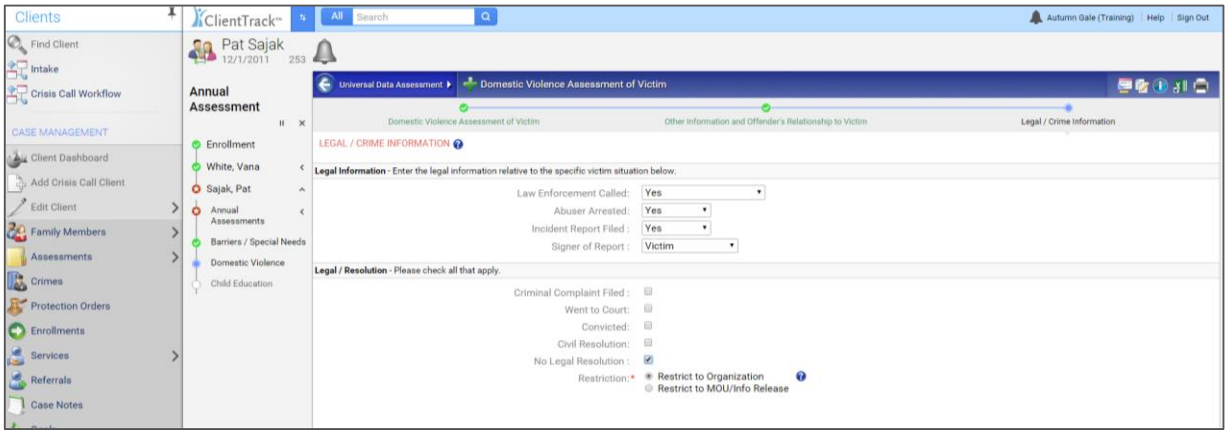
Domestic Violence Assessment for Child

Review the Domestic Violence assessment for the child and document any changes. You may click on the **"Default Last Assessment"** button at the top of the assessment to populate the client's information previously entered. Be sure to move through the assessment until it's completed and click **"Save and Close"** when finished.



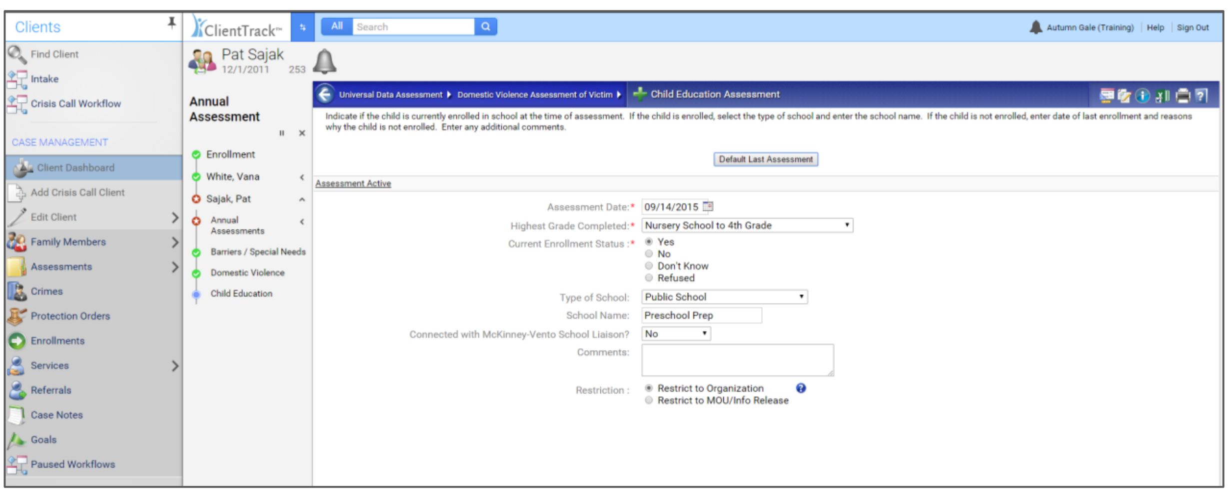


Domestic Violence Assessment for Child Continued

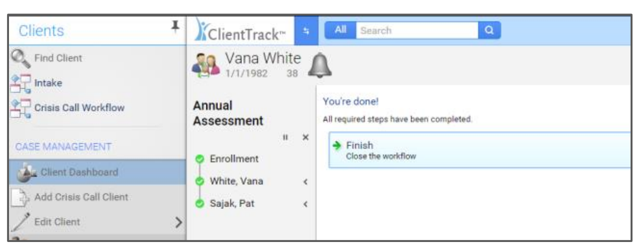


Child Education Assessment

Enter the "**Highest Grade Completed**" for the child, and then select if the child is "**Currently Enrolled in School.**" The built in logic may require additional information depending on how you answer the questions. You may also click on the **"Default Last Assessment"** button to populate what was previously entered if there has been no change to the education information. Click "**Save**" when completed.



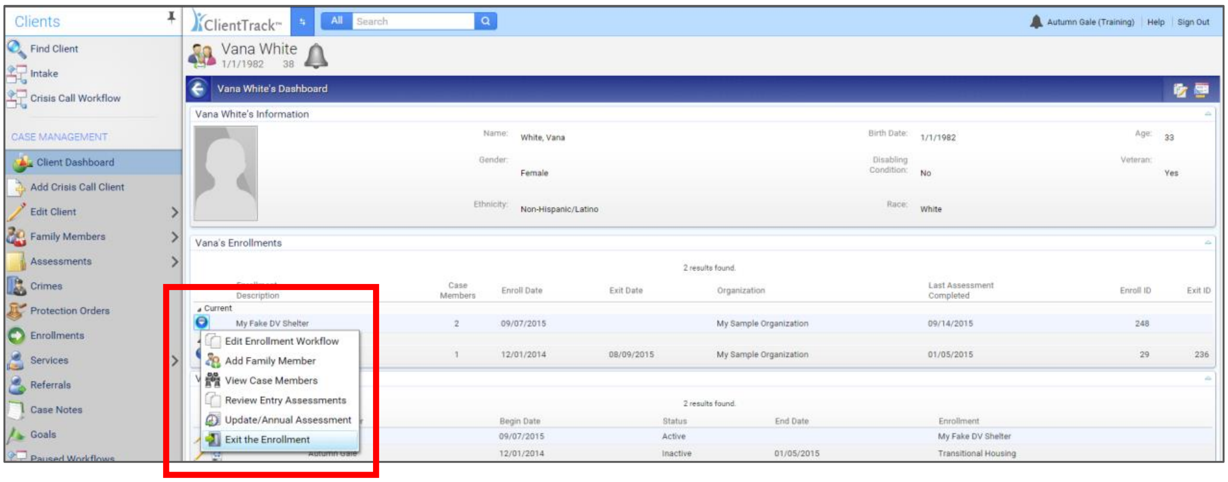
Once you have completed the required entry assessments for your client and household members, you will be prompted to **"Finish"** the workflow. If the workflow is complete then click **"Finish."** You will then be directed back to the head of household's client record.



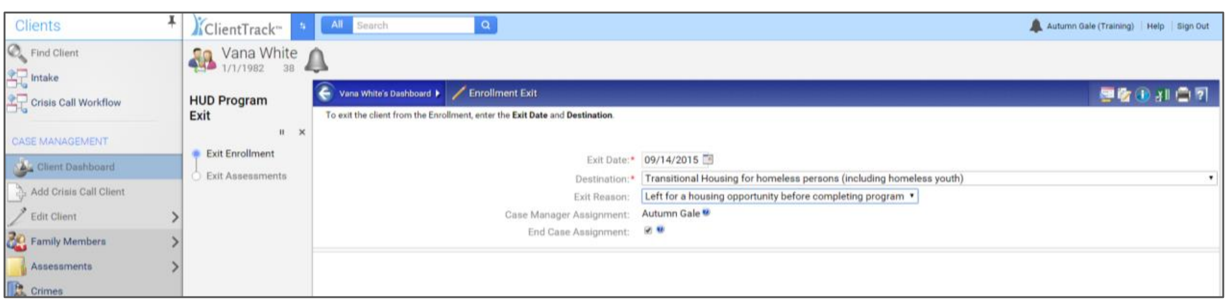
Program Discharge

When a client has transitioned from you project or is no longer receiving services for any reason, you will discharge the client from your program in ClientTrack with the following steps:

- Go to the client record;
- Click on the blue play button beside your project enrollment located in the center of the client record;
- Select **"Exit the Enrollment"** in the drop down list that appears after clicking on the blue play button; and
- Complete the information prompted for through the exit workflow and save as you go.

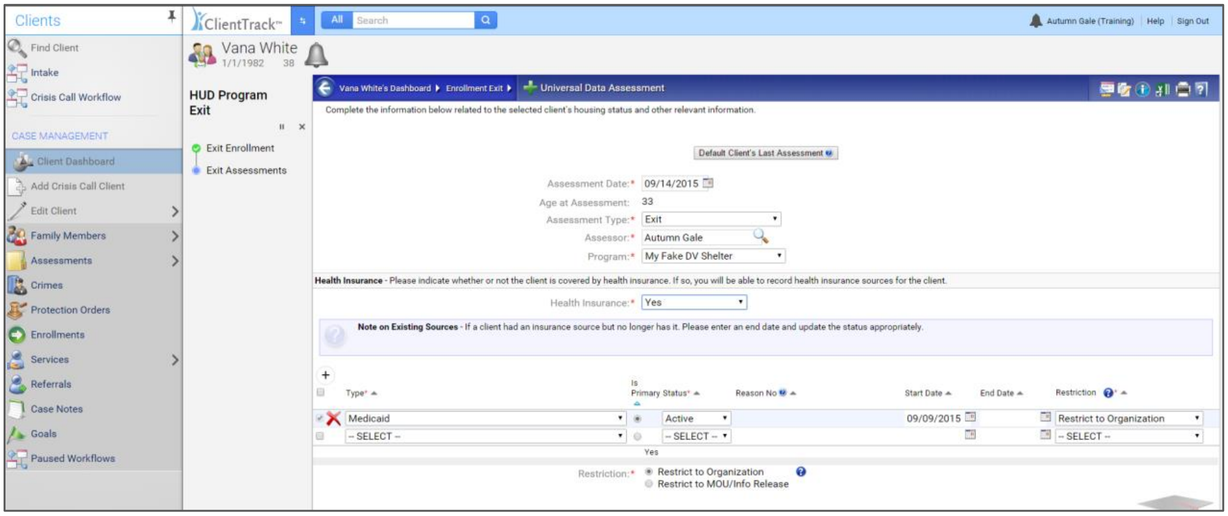


On the first screen of the exit workflow, you will be asked for the **"Exit Date," "Destination," "Exit Reason,"** and whether to **"End Case Assignment."** Please note that all fields with an asterisk * are required. Be sure to change the exit date to reflect the actual discharge date. Click **"Save"** when finished.



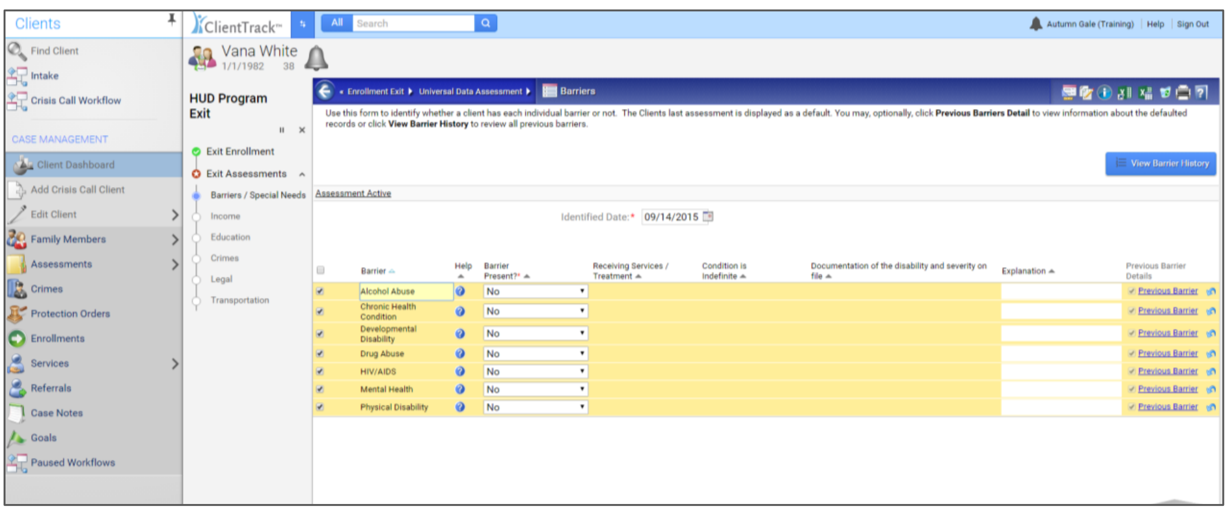
Universal Data at Exit

You will then review the head of household's universal data where you can document any changes. Please note that you can change the assessment date at the top of the screen to reflect the actual date of the assessment if entered at another time. Click **"Save"** when finished.



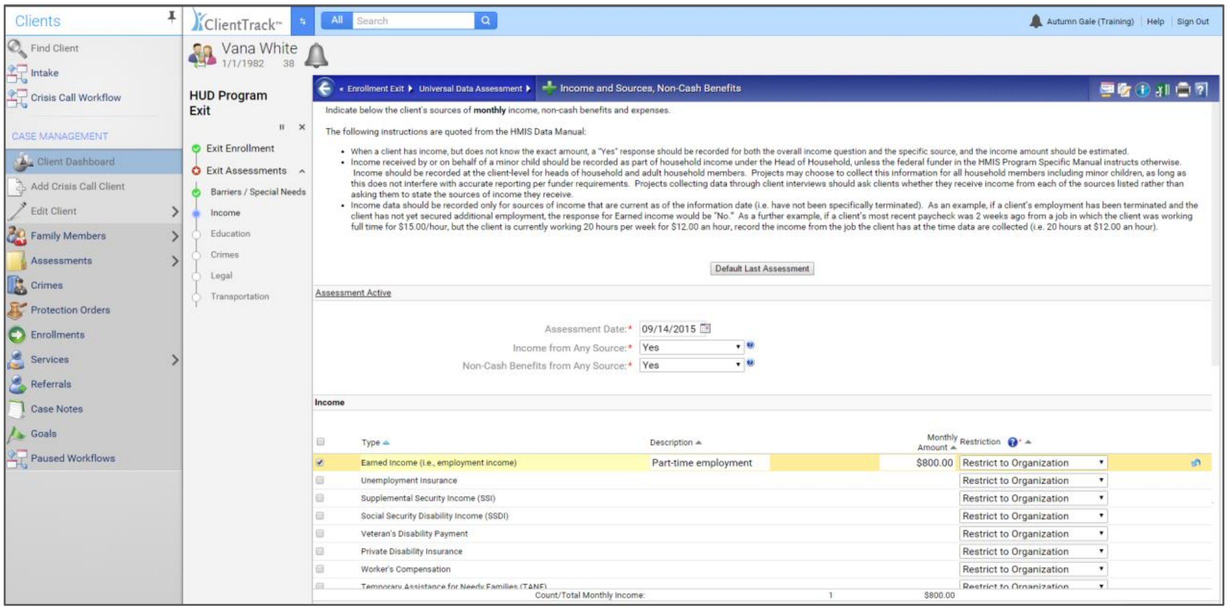
Barriers at Exit

You will be required to complete the HMIS Barriers Assessment at exit. The built in logic may create additional required fields. If **no barriers** are present at this time, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**



Financial Assessment at Exit

Complete the Financial information for the head of household at exit and document any changes to the household income. Be sure to scroll down to complete Non-Cash Benefits and click **"Save and Close"** when finished.

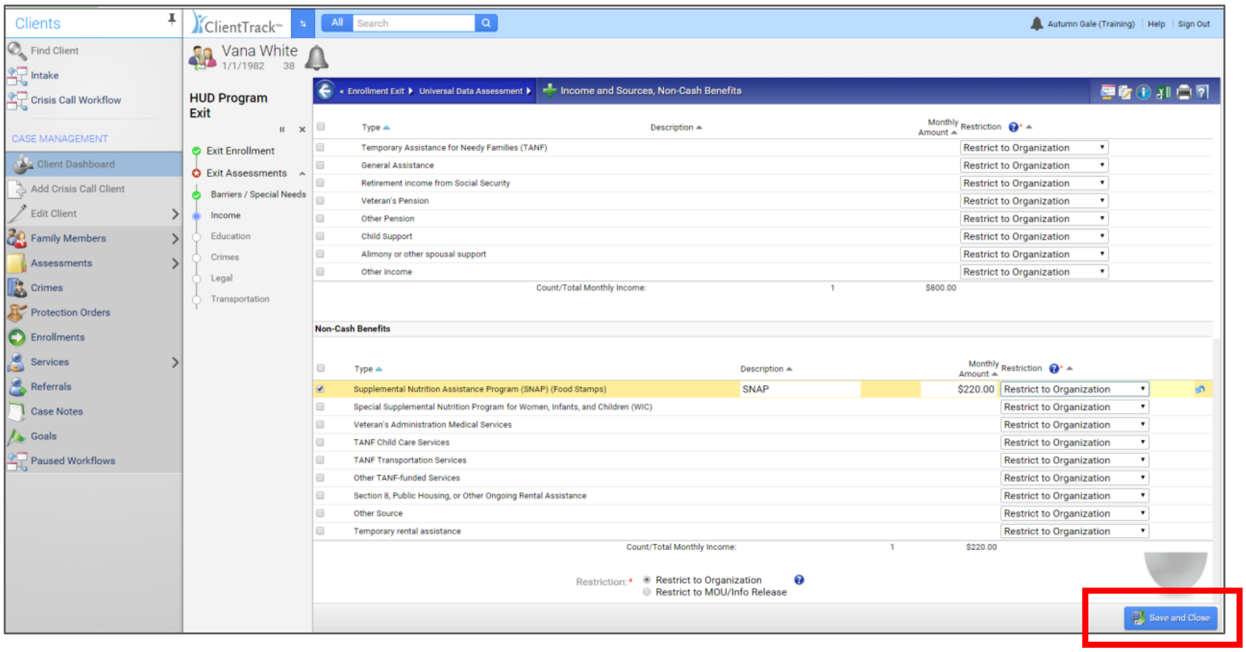


Definitions of Sources of Income

- **Earned Income** – Employment income
- **Private Disability Insurance –** Income received from private disability insurance
- **Unemployment Insurance** – Unemployment benefits from the State
- **Worker's Compensation –** Income for an individual who has been injured on the job
- **Pension From Former Job** – Income from a private employer or military retirement pay
- **Supplemental Security Income** – A federal program providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security) –** Income payment provided by government for individuals who qualify
- **Alimony** – Income received for spousal/partner support
- **VA Service-Connected Disability –** A benefit paid to a veteran because of injuries or diseases that happened while on active duty or were made worse by active duty
- **VA NonService-Connected Disability -** To assist wartime veterans in need whose non-service-connected disabilities are permanent and total preventing them from following a substantially gainful occupation.

Definitions of Sources of Income Continued

- **TANF** –Temporary Assistance for Needy Families
- **Child Support** – Income received from one parent to another to care for children
- **Other Income** – Any income not previously listed

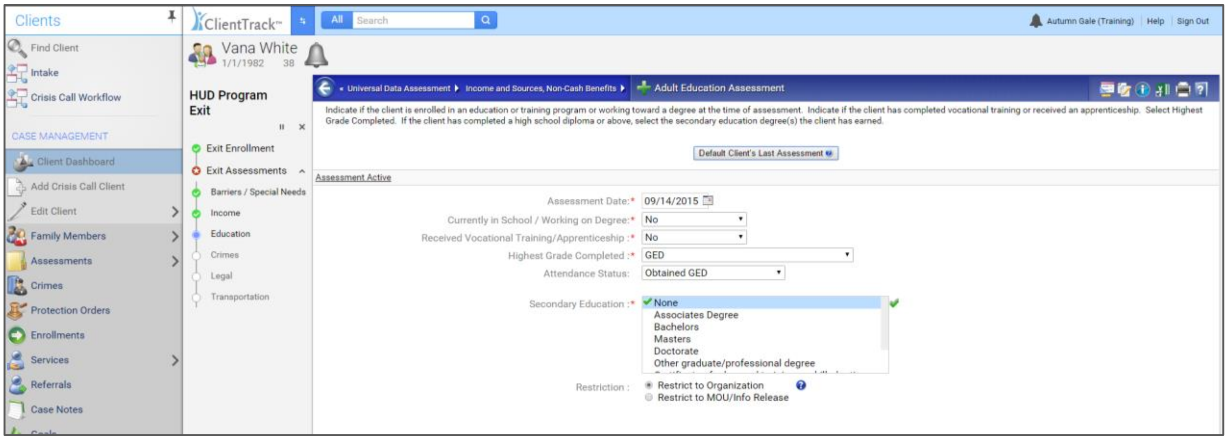


Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC**) – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Child care funding assistance
- **TANF Transportation Services** – Transportation funding assistance
- **Other TANF Funded Services**
- **Section 8, Public Housing or Other Rental Assistance (PSH)** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.
- **Temporary Rental Assistance (RRH)** – ESG rental assistance
- **Other Source** – Any source not previously listed above.

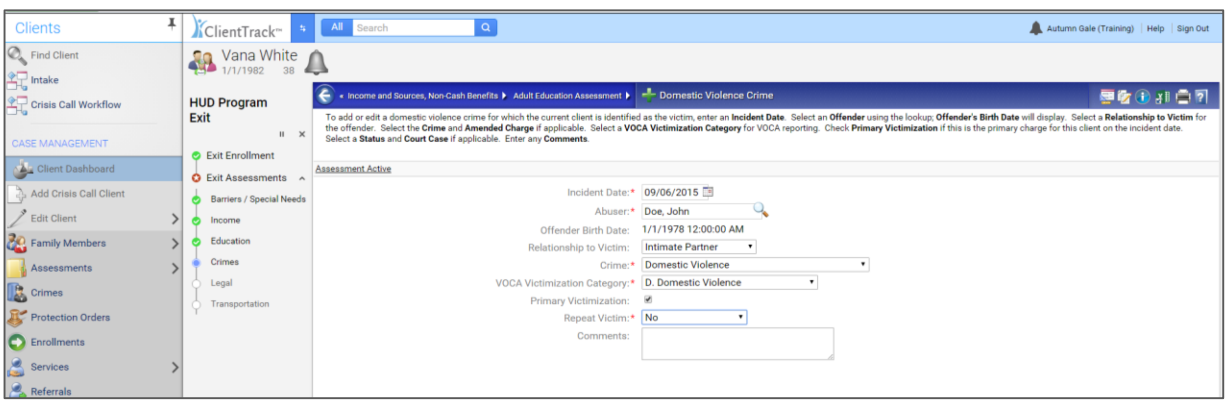
Adult Education Assessment at Exit

Complete the Adult Education Assessment. Remember that all fields with an asterisk * are required. The **"Default Client's Last Assessment"** will populate information from the previous assessment completed and is helpful if the client's information has not changed. Click **"Save"** when finished.



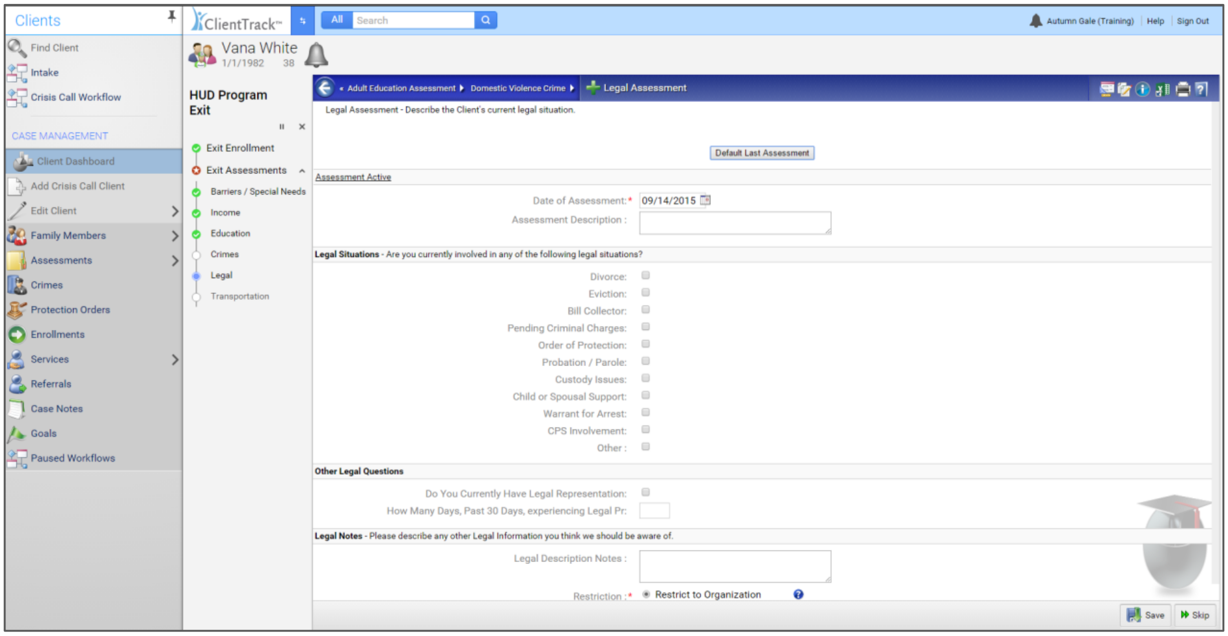
Crimes Assessment

Complete the requested information, noting that all fields with an asterisk * are required data elements. You may also click **"Skip"** if the data is not collected or required.

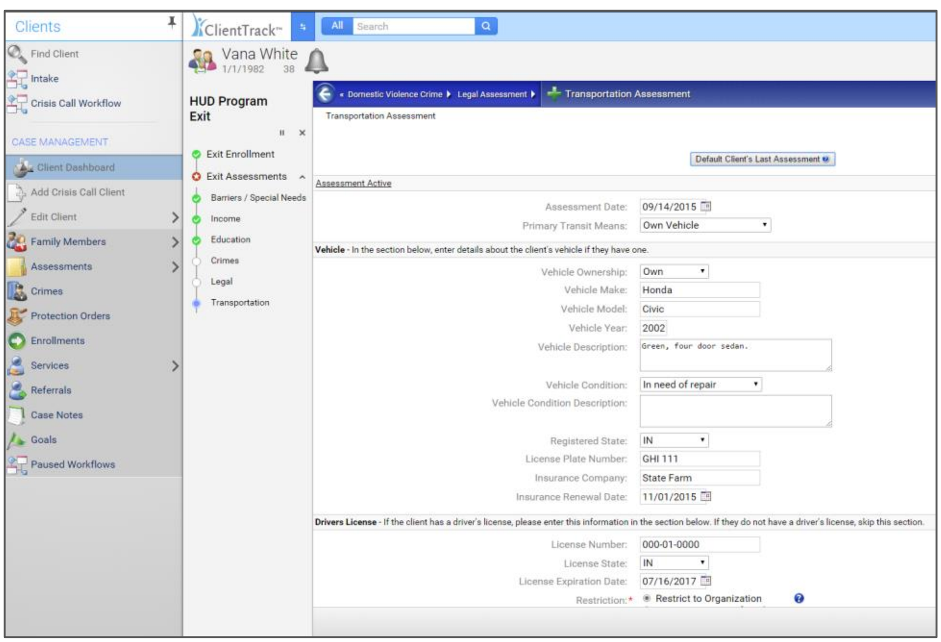


Legal Assessment at Exit

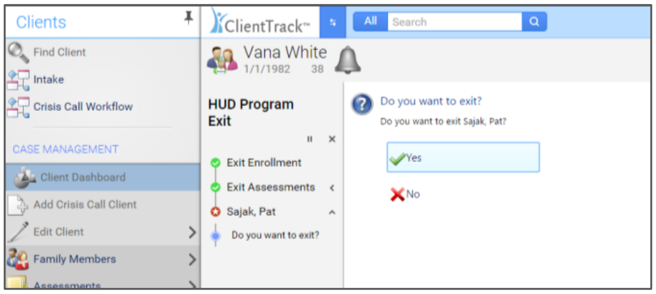
Complete the requested information, noting that all fields with an asterisk * are required data elements. You may also click **"Skip"** if the data is not collected or required.



Transportation Assessment at Exit



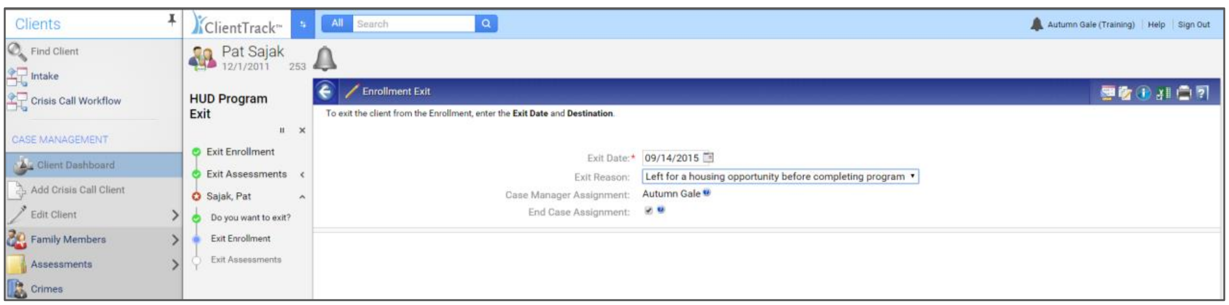
Complete the requested information, noting that all fields with an asterisk * are required data elements. You may also click **"Skip"** if the data is not collected or required.



Once you have completed the Transportation Assessment, you will be asked if you wish to exit all case members. Select **"Yes"** or **"No"** depending on whether all members are exited at the same time. You can exit one case member and leave other case members enrolled. If you select **"Yes,"** you will be prompted through the exit assessments for all case members.

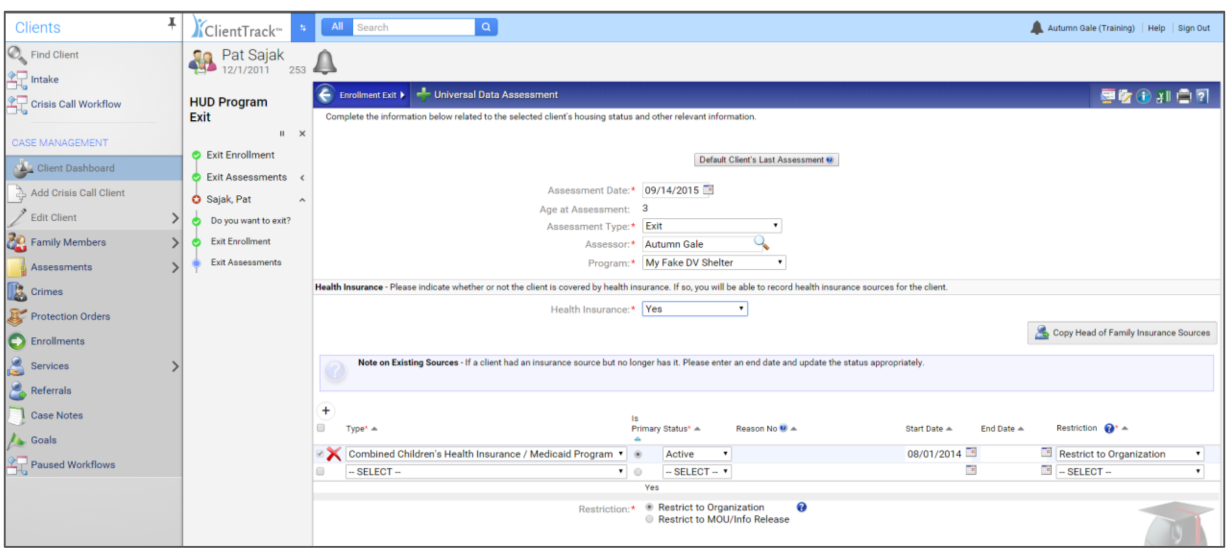
Exit for Child

After completing all of the exit assessments for the head of household, you will be prompted through the exit assessments for all enrolled household members. The adult exit assessments will look like the head of household's assessments. The exit assessments will look differently for children.



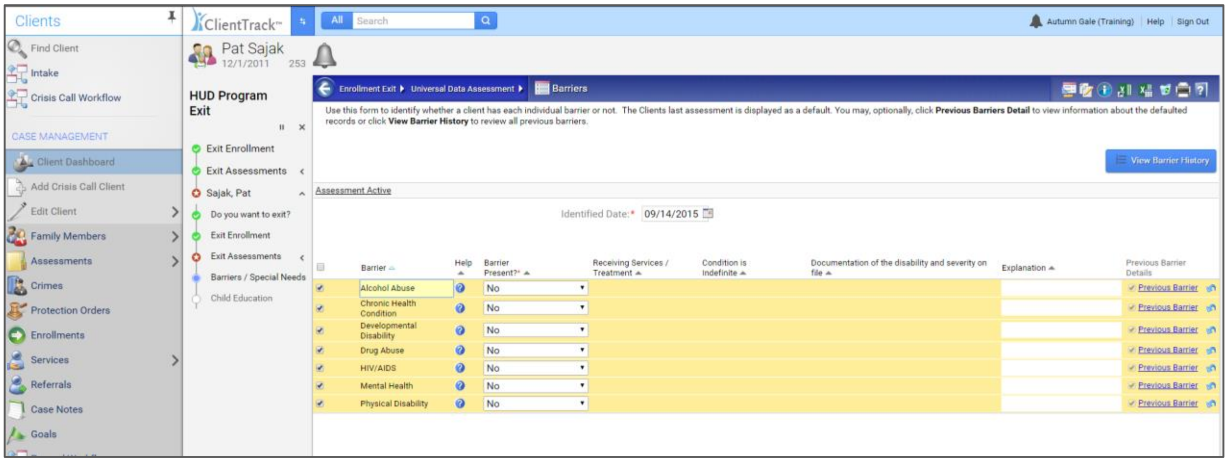
Universal Data Assessment at Exit for Child

Complete the required information on the Universal Data Assessment at exit for the child and click **"Save"** to continue.

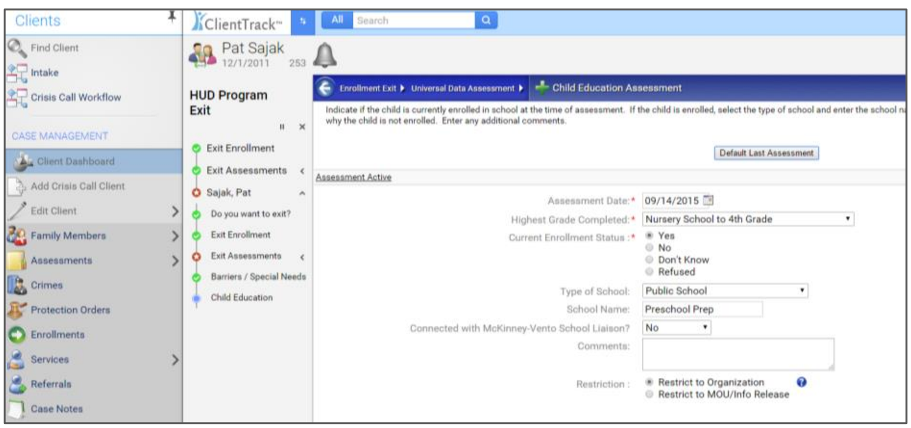


Barriers Assessment at Exit for Child

Complete the Barriers Assessment for the child at exit. If **no barriers** are present at this time, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**



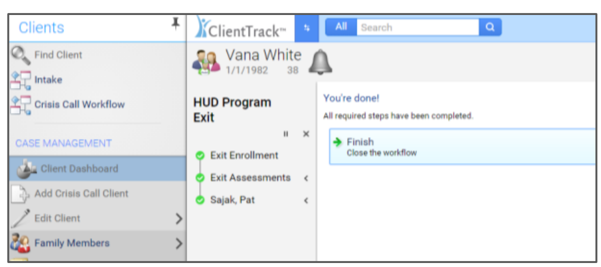
Child Education Assessment at Exit



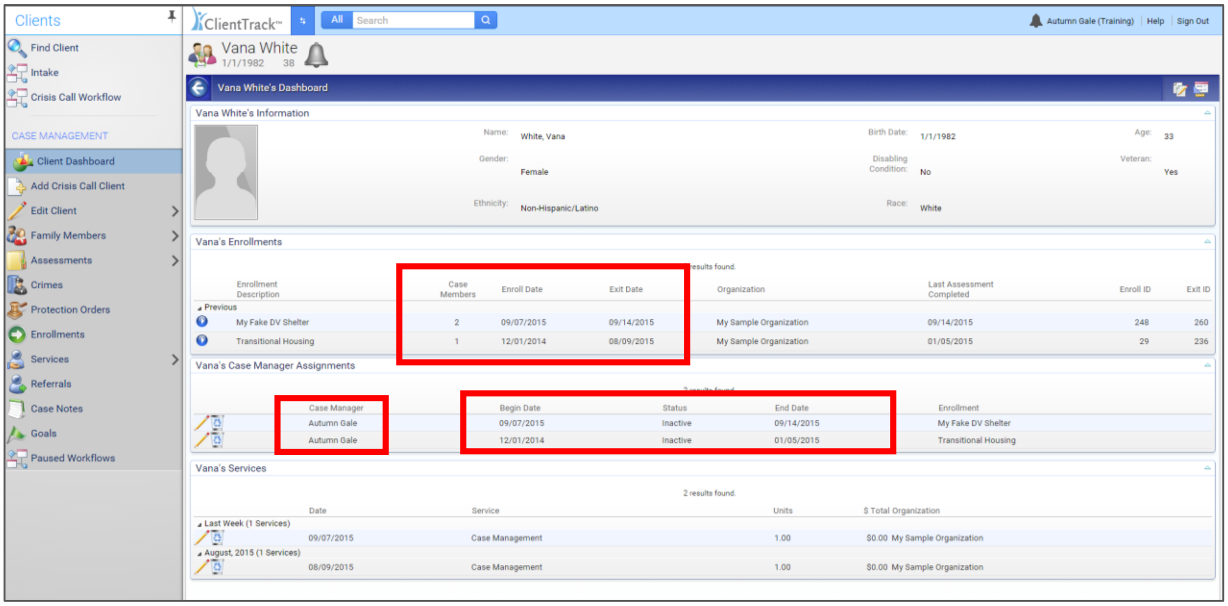
Enter the "**Highest Grade Completed**" for the child, and then select if the child is "**Currently Enrolled in School.**" The built in logic may require additional information depending on how you answer the questions. Click "**Save**" when completed

Completing the Exit Workflow

When you have completed all exit assessment for all household members, you will be asked to finish the exit workflow. Click **"Finish"** to complete the discharge for your clients.

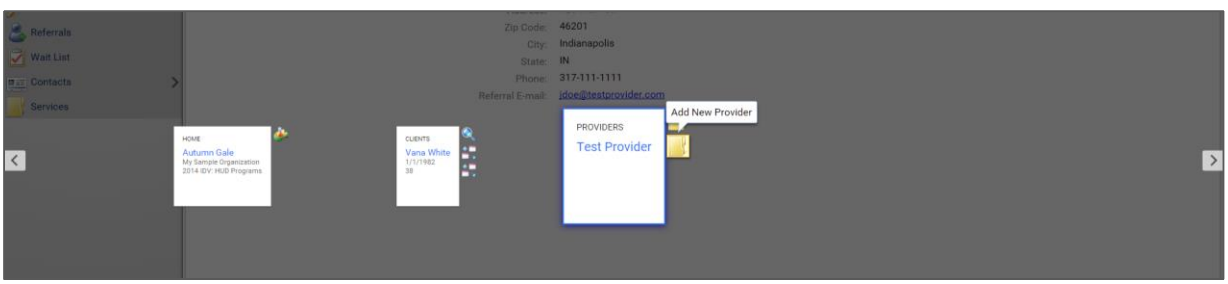


You will then return to the client dashboard where you can see the project exit dates now as seen below. If you have also selected **"End Case Assignment"** on the exit workflow, you will see that your status has changed to **"Inactive"** on the client dashboard under **"Case Manager Assignments."** If you forgot to click on the box beside **"End Case Assignment"** during the exit workflow, you can click on the little notepad beside your name under "**Case Manager Assignments"** to edit your status to **"Inactive"** to remove the discharged client from your case load.

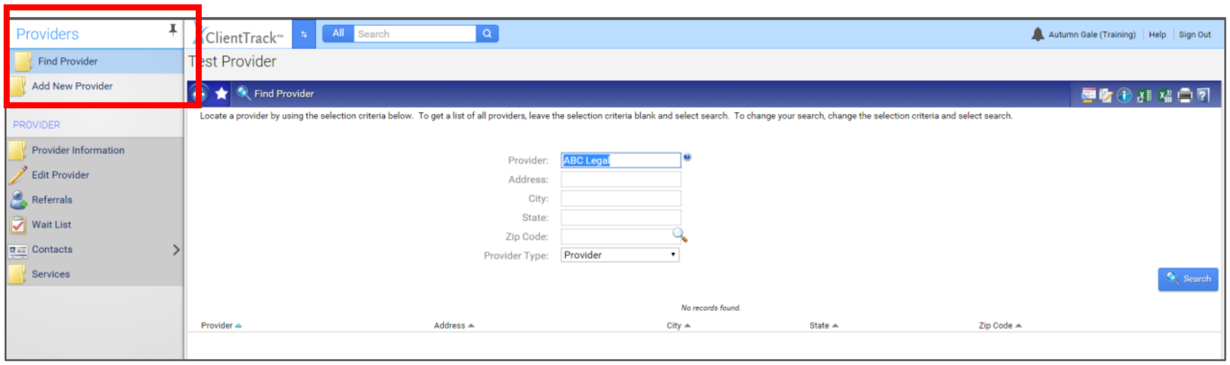


To Add a Provider To Your List of Providers

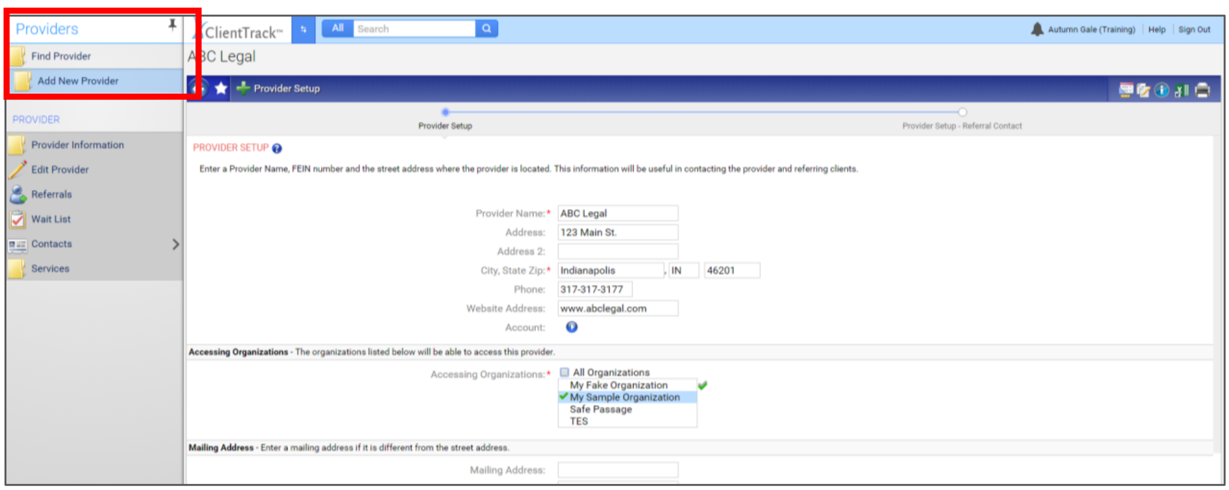
- Click on the blue box with the white arrows beside the ClientTrack logo at the top of the screen to toggle to the **"Providers"** screen.



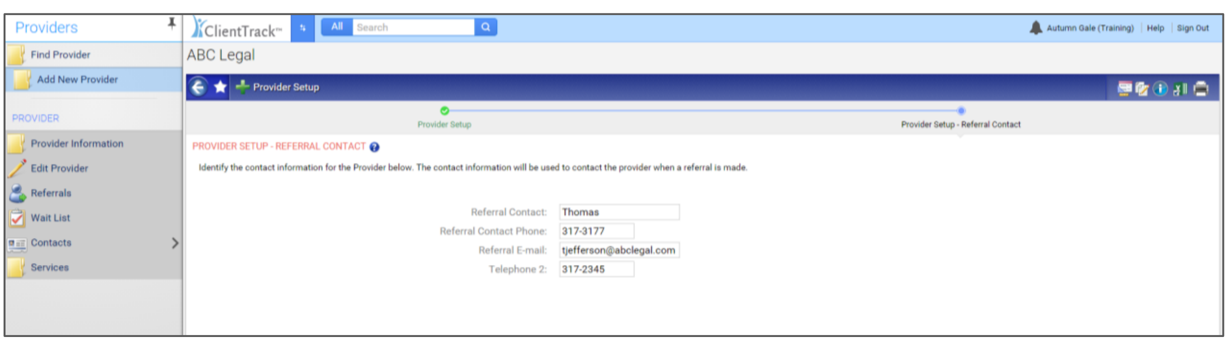
- Conduct a search for the Provider in the database by clicking on the **"Find Provider"** link in the upper left-hand corner of the screen.



- Click on the **"Add New Provider"** link if the Provider is not already in the system located below the **"Find Provider"** link in the upper left-hand corner of the screen.
- Complete the provider information. You must complete information that has an asterisk * before continuing.



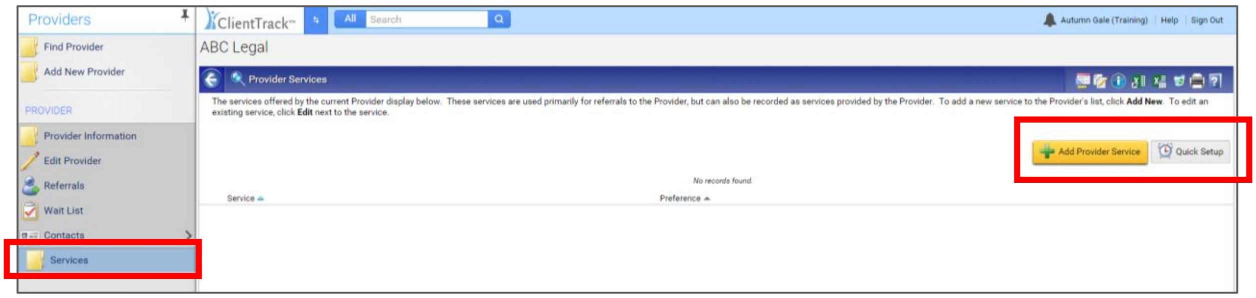
- Click **"Next"** in the bottom right-hand corner of the screen.
- Complete **"Referral Contact"** information.



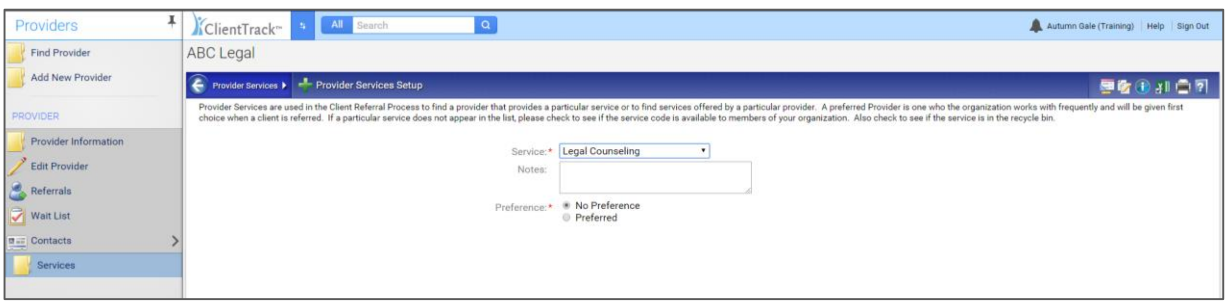
- Click on **"Finish"** to complete the addition of a Provider to your searchable list. You can go back to the previous screen if necessary by clicking on **"Previous."**

After adding the provider to the provider database through the above steps, ***you need to complete one more step before you can access the provider when setting up referrals and services.***

You must correlate a service with the provider and you can do this by remaining on the provider record and clicking on **"Services"** in the list of Menu Items found on the left-hand side of the screen. Click on **"Add Provider Service"** and select a service you want correlated with the provider. You can add as many services as you would like.



Once you have finished this final step, you will be able to select the provider when creating a referral or service.



Basic Reports

SERVICE SUMMARY REPORT

The Service Summary Report is a report of the services your agency has provided for clients enrolled in a specific project. You can run a Service Summary Report a variety of ways to extract specific service information from client records, for example services rendered in the Month of December or Case Management Services provided for the year, etc. Most often the Service Summary Report is used to submit for reimbursement.

To Run a Service Summary Report:

- Click on **"Reports"** found in the list of options in the bottom left-hand corner of your User Dashboard.
- Click on **"Service Reports"** found in the list of links on the left-hand side of the screen. A list of reports should drop down after clicking on the "Service Reports" link.
- Click on **"Service Summary Reports"** that immediately appears under "Service Reports" with a file folder beside it.
- Click on **"Service Summary"** that appears directly in the drop down beneath "Service Summary Reports" after clicking on it.
- Set up your report parameters by: *(Please note that all fields with an asterisk * are required fields)*
    - **Completing the date range** – There are a couple of options for setting the date range. You can select from the **"Predefined Date Range,"** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **"Between."** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2014 and 12/31/2014. This will give you all of the clients in your program for the entire year of 2014.
    - **Filtering by "Programs"** – Select the **"Program"** you want to run a Service Summary for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a program. You can run multiple programs on the same report. Simply select more than one **"Program"** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
    - **Selecting "Grants"** – Select the **"Grant"** you want to run the APR for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. However, your grant options will be dictated by the "Program(s)" you selected in the "Filter by Program(s)" box. If more than one grant appears, simply select more than one **"Grant"** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
    - **Filtering by User(s), Housing Status, Results by Age, State(s), Counties, Zip Code(s) and more** – Select a variety of parameters to extract more specific service data from clients your

organization has served. Most of these selections will allow you to select more than one option in the box. Again, simply click on the option in the box and a green check mark will appear. To unselect an option, click on it again and you will see the green check mark disappear.

- Click on the **"Report"** button found in the bottom right-hand corner of the screen. This will begin running your report. You should see your report pop up in a new window within seconds. You can export your report to a pdf file for email transmission or record-keeping by clicking on the pfd icon in the upper right-hand corner of the report window.

ANNUAL PERFORMANCE REPORT (APR)

The APR is a comprehensive report of your program – who you served and how you served them. It is recommended that you run an APR often throughout the year to track missing data so that your report is complete when it is time for the annual submission. Here are quick steps to running the report and cleaning up missing data.

To Run an APR:

- Click on **"Reports"** found in the list of options in the bottom left-hand corner of your User Dashboard.
- Click on **"HMIS Reports"** found in the list of links on the left-hand side of the screen. A list of reports should drop down after clicking on the "HMIS Reports" link.
- Select **"APR for CoC Grant-Funded Programs"** in the list of reports that appear in the drop down.
- Set up your report parameters by: *(Please note that all fields with an asterisk * are required fields)*
  - **Completing the date range** – There are a couple of options for setting the date range. You can select from the **"Predefined Date Range,"** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **"Between."** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2014 and 12/31/2014. This will give you all of the clients in your program for the entire year of 2014.
  - **Choosing the "Grant Program" and "Grant Program Component" -** Select the grant your program is under in the drop down for **"Grant Program."** This will prompt the next selection in **"Grant Program Component."** If you do not know this information, feel free to try several selections to find the correct options for your program. You won't break it by choosing different options. If you do not see the correct set up information here, contact the HMIS Help Desk by emailing DVHelpDesk@ihcdaonline.com. Also note that **"Grant Program"** and **"Grant Program Component"** are not required fields, so you can run the report without making these selections, which is best done when running reports for several projects.
  - **Selecting "Grants"** – You may see several options to choose from after selecting **"Grant Program"** and **"Grant Program Component."** Again, the aforementioned Grant Program and Grant Program Component will determine the options you see in this box. Select the **"Grant"** you want to run the APR for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. Simply select more than one **"Grant"** by clicking on the name in the box. Again,

you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.

- **Clicking on "Project Type"-** Select a project type with the drop down list that appears. You may only select one "Project Type" at a time. Please note that Project Type and Program must be selected to populate the final measurement on Q.36 of the report. You can run your report without selecting "Project Type" and "Program," but the measurement on the last page will not populate data.
- **Clicking on "Program(s)" -** Click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well like the "Grant" parameter.

- Click on the **"Report"** button found in the bottom right-hand corner of the screen. This will begin running your report. You should see your report pop up in a new window within seconds.

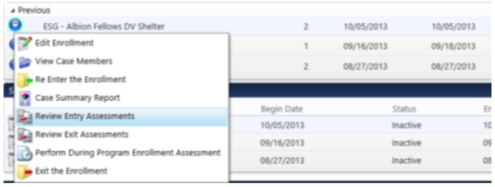
To Drill Down and Find Missing Data

After you run your report and it opens in the new window, you can click through it and see what sections of the report show "Missing" data. To find clients who are missing data, follow these steps:

- Click on the **blue link** for that section where you are missing data, for example "Q.7 Data Quality." *Please note that not all sections have a link to select. You may be able to find this missing data in another section of the report or you can contact the HMIS Help Desk for assistance.
- Another window will pop up with more detailed information for this section. You may be able to find your missing data in this screen, but it may be more helpful to **export it** to an Excel Spreadsheet to find the missing data in a more detailed, organized format.
- To export, click on the **Excel icon with the gold spindle** in the upper right-hand corner of the pop up window. You will be asked to **"Open"** or "Save" the spreadsheet, select **"Open"** to review the data. *Be sure to clear your downloads in your Internet browser after exporting client data.*
- You will see the word **"MISSING"** on the spreadsheet where clients are missing data. The columns are labeled at the top of the spreadsheet and client names are on the far left-hand side of the spreadsheet. You can then go to client records and complete the missing data.

To Complete or Edit Missing Data

In unusual cases, there may be a missing enrollment ID for an entry or exit of a client. You can complete the entry and/or exit assessments after an HMIS technician has set up the master assessment. If you need assistance with setting up the master assessment, contact the HMIS Help Desk at DVHelpDesk@ihcdaonline.com. Follow these steps to complete missing data on the assessments:



- Go to the client's record who is missing the assessments.
- Click on the blue play button found on the client dashboard under "[Client Name] Enrollments" located centrally on the client's record.
- Select "Review Entry Assessments" or "Review Exit Assessments" (depending on which one you need to complete) in the drop down list.
- Complete the required entry or exit assessments by clicking on the little notepad beside each assessment.
- Save as you edit or complete assessments by scrolling down on the assessment screen and clicking on "Save."
- Blue check marks will appear after the assessment is completed.